2018

Learning Tools to Reduce Poll Worker Error Rates in Bernalillo County, NM

2018 EAC Election Worker Competition
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BERNALILLO COUNTY, NEW MEXICO | Bureau of Elections

The Training Department in the Bernalillo County Clerk's Office trains hundreds of citizens during election years to work as poll officials in 20 Early Voting Convenience Centers and 69 Election Day Voting Convenience Centers throughout the county, which is the most populous in the state of New Mexico with 420,262 registered voters. The poll official training program was overhauled this year in an effort to reduce time spent in class. The program centered on principles of andragogy – or adult learning – that offer adults various ways to receive and retain a tremendous amount of information about the elections process. With these adult learning principles in mind, the program focused on three critical training components to maximize learning and reduce poll worker errors. The centerpiece of the training program was a new online video series called "Learn the Vote" – the first poll worker online training program in New Mexico. The last two components of our program were new streamlined training manuals and news and feedback tools

Bernalillo County's Learn the Vote logo.

provided in a new quarterly newsletter and a post-election survey for poll officials.

Background

Based on initial results of the 2018 post-election survey of poll officials, we know that 61% of Bernalillo County poll officials are retired, with 75% of them reporting some type of post-secondary education. The new training program this year had to take into account these adult learners' needs and consider how to reduce the time they spent at our Voting Machine Warehouse, where required in-person training is held. In 2016, Presiding Judge classes were six hours long; System Clerk classes were three hours long; and Floor Judge classes were four hours

long. In 2016, a 95-page manual provided details on every aspect of elections. Class time had

hand's-on training with tabulators and electronic ballot on demand systems. The demanding

classes meant that poll officials received a lot of information in a short amount of time and some

of the information was not pertinent to their job duties. Many poll officials left class feeling

overwhelmed about what they had to do. As one poll official told us in the 2016 post-election

poll official survey: "I felt like I was drinking water from a firehose!"

The results of the 2016 training program were overall successful. However, there were

mistakes. Among them:

- Nine provisional ballots were cast in tabulators at various polling locations throughout the county.
- The Clerk's Office secured a judge's order to access several ballot boxes in search of ballots that were not entered by hand, meaning poll officials did not count them.
- The Clerk's Office secured a judge's order to access ballot boxes in search of permits that accompany ballots.
- Ballot boxes that were left behind at a polling location on Election Day required the Presiding Judge and a Clerk's staff member to return to the location to retrieve the ballot boxes.
- Presiding Judges were called back to our canvassing warehouse to sign election night documents.

"Learn the Vote" Video Series

In 2017, I started preparations for the 2018 General Election training program. I knew I

wanted our poll officials to get all the information that they needed to be successful and to

reduce some of the errors that we saw in 2016. I always remembered the "firehose analogy" in my preparations. I did not want poll officials to sit in a class for six hours to receive the information and forget most of it when they left our training warehouse. I wanted them to be able to access the information at their leisure and review it as often as they needed to. An online training opportunity met these goals.

For these adult learners, I utilized the idea of scaffolding, or organizing the election information into chunks. The result of this "scaffolding" was the development of the Bernalillo County "Learn the Vote" video series for poll officials. It is the only online training program used for poll officials in the state of New Mexico. This new and unique online training program offered nine short instructional courses about the elections process. The lessons – each no more than 12 minutes long – were devoted to critical aspects of the Bernalillo County elections process:
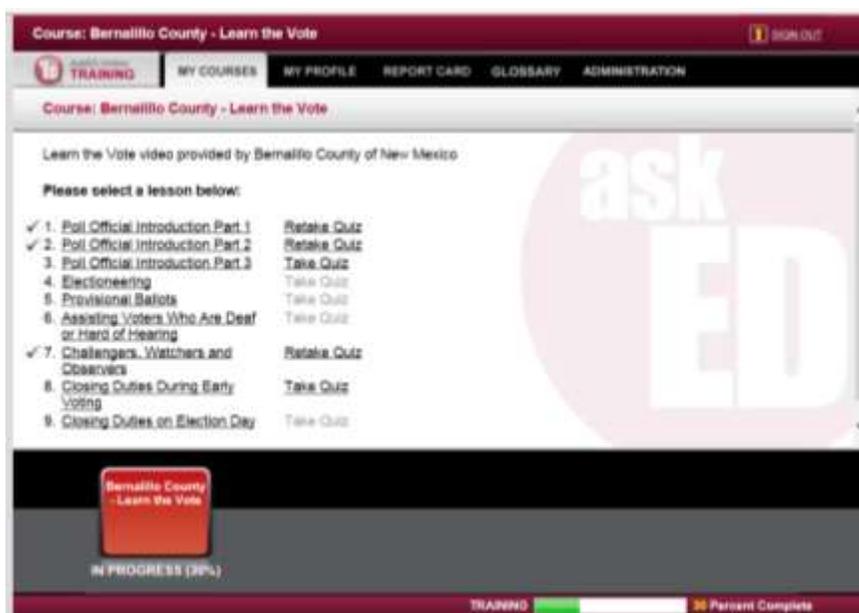

Figure 1 Nine instructional videos

- ***Three-Part Introduction:*** Videos covered three areas of poll official work: Duties and responsibilities of a poll official, including report times and dress code; how polling locations are set up to comply with Americans with Disabilities Act requirements; and the types of equipment poll officials would be using at their polling locations.

- ***Electioneering:*** What the New Mexico electioneering law says and how poll officials should apply the law.

- ***Provisional Ballots:*** What a provisional ballot is, why it is issued, and how Bernalillo County poll officials should process these ballots to ensure they are not cast in tabulators.

- ***Assisting Voters Who Are Deaf or Hard of Hearing:*** We worked with the New Mexico Commission for Deaf and Hard of Hearing in 2016 to help them encourage their audience to vote. That effort resulted in the commission creating a video especially for poll officials. We want our poll officials to know how to assist a person who is deaf or hard of hearing and we gladly added this segment to the Learn the Vote video series. One poll official said in the 2018 post-election survey: "Video on working with people with disabilities was good...I had to help a person that was mute and that was my first time."

- ***Challengers, Watchers, and Observers:*** Who are they and how do poll officials accommodate them, including how to handle challenges interposed by challengers.

- ***Closing Duties during Early Voting:*** The Bernalillo County video team assisted me in creating this video about closing and reopening tabulators during Early Voting.

- ***Closing Duties on Election Day:*** There are so many closing duties on Election Day, and the Bernalillo County video team helped me to create this video about closing a tabulator and printing results tapes on Election Day.

I used the simple – and free – Microsoft PowerPoint program to make the video tutorials. I did a lot of research for state and national materials. I wanted to offer poll officials background information that in the past could not be shared in class because of time constraints. PowerPoint comes with audio recording capability and I used this tool on each slide. I added most of the script to each slide for ADA-required functionality that also helps adults who like to learn by

listening and reading instructions. The final PowerPoint product was exported as an MP4 video and easily loaded to the platform that was used to house our online training module.

Interactive Online Quizzes. I wrote short and simple quizzes that followed each video tutorial so that poll officials could test their knowledge. One poll official said of the quizzes in the 2018 post-election survey: "I really enjoyed taking the quizzes of all different positions. I thought that was a terrific new addition to the classes." The interactive quizzes gave poll officials immediate results for each answer they logged and allowed a poll official to try again if he or she got the answer wrong.

Summary. The online videos shortened required in-person training. Poll officials had to bring their certificate of completion before attending class (Figure 2). The Presiding Judge classes were four hours long. System Clerk classes were one and a half hours long and Floor Judge classes were two hours long. By putting elections

Figure 2 The Bernalillo County training room shows off certificates of completion for all poll officials.

information from the former 95-page manual into video chunks, we were able to get poll officials straight to hands-on training in the classroom and shorten their time in class. Two poll officials commented in the 2018 post-election survey:

- "The videos made it much easier to move swiftly through in-person training."
- "It was a lot of info to digest; class combined with online was perfect."

Try our "Learn the Vote" tutorials here: https://olt.goasked.com/NM/Login.aspx

Username: **EACUser**

Password: **eef8b236**

Training Manuals

The 2016 poll official manual was too long and cumbersome to use. Every poll official has a different need and the training manual could be a hindrance to finding information. For example, if System Clerks wanted to know how the procedures for issuing a provisional ballot, navigating the 95-page manual to find the information was tedious and time-consuming.

In 2018, I utilized the scaffolding concept to create training manuals for each type of poll official and their particular job duties. The three manuals were shorter, and each had systematic instructions for various processes and procedures. Graphics accompanied each of the instructional steps.

For example, Figure 3 shows a Floor Judge how to accept a permit and guide a voter to insert a ballot in a tabulator. In addition to graphics, System Clerks had screen shots and step-by-step instructions for various ballot scenarios, including the routine voter, the voter who must show an ID but cannot do so, the spoiled ballot, the provisional ballot, and how to
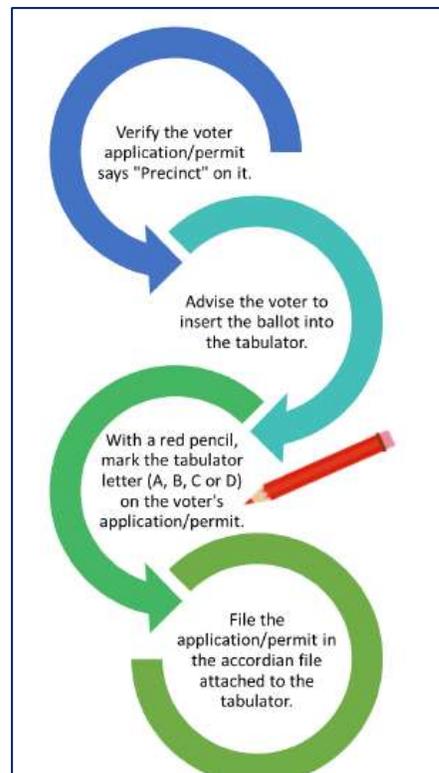

Figure 3 Floor Judge Procedure

Figure 4 System Clerk Procedure

search for a voter. (Figure 4). In-class training allowed System Clerks to practice each of these scenarios with real-life voters who met these various criteria.

The highlight of the 49-page training manual for Presiding Judges and Exceptions Judges was a section called "Wrap-Up: Where Does Everything Go?" Based on past confusion that resulted in various errors described above, I wanted PJs to have an easy-to-digest summation of all they need to do before leaving their polling location. The "Wrap-Up" section gave PJs a final pictorial
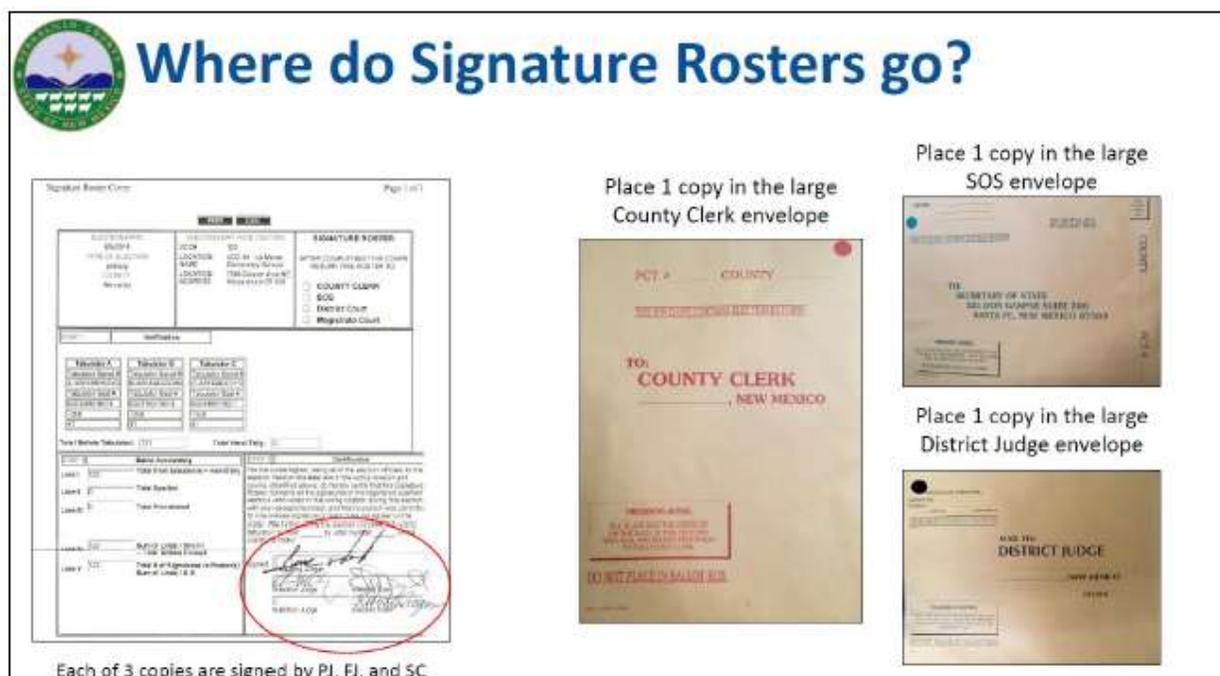

Figure 5 Wrap-Up: Where do Signature Rosters go?

checklist to ensure they had all they needed before leaving the polling location. In the 2018 post-election survey of poll officials, one Presiding Judge said this of the Wrap-Up pictures: "I think this training was the best ever! Also, the EJ/PJ manual was excellent with the end of day pictures!"

The Bureau of Elections staff had a good indication of the value of the Wrap-Up pictures (Figure 5) in post-election duties, such as Election Night Drop Zone, canvassing and auditing. Presiding Judges were successful in these areas:

- No provisional ballots were cast in tabulators.

- We did not need a judge's order to open ballot boxes on Election Night.

- Poll officials entered their hand tally ballots and printed their reports.

- Presiding Judges signed all the required closing reports.

- At our Election Night Drop Zone, Presiding Judges were able to provide all the required ballot boxes and ballot pouches to Clerk's staff.

Poll Official Newsletter and Post-Election Survey

Adult learning strategies incorporate feedback and follow-up. With this in mind, a quarterly email newsletter allowed our staff to offer information to poll officials as we progressed through the year. For example, our first quarterly advised poll officials that we would be hiring for the primary and what the timeline was. Our last quarterly newsletter gave poll officials kudos for their successes, among them that no provisional ballots were cast in any tabulators this year. Further, we continued our post-election survey of poll officials in an effort to gather their thoughts and feedback. Our poll officials work very hard for little money, and it is important that we ask them how we can improve the elections process. The newsletter and post-election survey illustrate to them that we appreciate their efforts. The 2018 Quarterly Poll Official newsletters is located here: http://www.bernco.gov/clerk/poll-officials.aspx. The Survey Monkey post-election survey link is here: https://www.surveymonkey.com/r/NM2KSQW

Conclusion

- **Efficacy.** Online training reduced class time by one and a half to two hours. It also increased the opportunity for a poll official to review materials as often as needed. Its effectiveness in providing extra resources for poll officials clearly reduced poll official

errors in the 2018 General Election. Drop Zone, canvass and audit processes went extremely well, with very few problem situations caused by improper procedures. When you consider that taxpayers support the Clerk's Office, our staff spent less

Figure 6 Poll officials attend a System Clerk class at the Bernalillo County Voting Machine Warehouse.

time tracking down and fixing errors made by poll officials. Clerk's staff completed the canvass within the statutory 13 days, and Clerk's staff completed the general election audit in less than two days. The efficiency of our work – and the efficient use of taxpayer dollars -- is a direct result of improved poll worker outcomes.

- **Innovation.** Bernalillo County's "Learn the Vote" series is the first online poll official training program to be used in the state of New Mexico. More importantly, poll officials had the convenience of watching the videos on their computers, phones or iPads. They could also watch these videos as often as they wanted to. Coupled with their training manuals, poll officials had a unique program that allowed them to receive all the information pertinent to their success. Poll officials were able to receive a lot of information in learning styles that supported each poll official, whether that be audio, visual, or auditory (or all three!).

- **Sustainability.** The online videos, manuals, and quarterly newsletters can easily be replicated and updated for future elections. The hard work was deciding what elections content to create and then putting the relevant information together for each video module. The easy part will be updating the content for future election scenarios. Further, we accommodated poll officials who could not access the online videos from home. Of the

745 poll officials who worked the 2018 General Election, 566 (76%) accessed the online training at home and watched the minimum three introductory videos. For the other 179 (24%) poll officials who had trouble accessing the online program at home, our department provided six computers that could be used by poll officials to watch the videos before they attended class. In all, 100% of poll officials watched the video courses, with 40% of poll officials completing all nine video courses. Considering that this was a completely new way to receive training and most of our poll officials are retired and older than 60 years old, this was a tremendous success. It is feasible that we will achieve 100% at-home video training in the 2020 election cycle.

- **Outreach efforts.** The quarterly newsletter and post-election survey are great additions to our outreach efforts. Poll officials were able to get information from newsletters that was not readily available to them in the past unless they called and asked us. We used email to send poll officials notice that we had a new quarterly newsletter ready for them. Asking poll officials for their feedback in the post-election survey is also a nice way to recognize their efforts in the field and show them that we appreciate them and we do want to make our processes better for them in the future.

- **Cost-effectiveness.** The total cost of the training program was higher in 2018 versus 2016. However, the few errors we saw in the 2018 General Election supports the expenditure.

  1. The vendor who supported our Learn the Vote video series charged us $10 per user for a total of $7, 450. There was no cost to create the videos themselves, as I

utilized the Bernalillo County video team and Microsoft PowerPoint to create the video content.

2. In the 2016 General Election, it cost $9,950 to print 1,250 manuals with spiral binding and laminated cover. This year, it cost $4,963 for 1,300 manuals. This is a reduction in manual costs. However, adding the cost of providing videos to our poll officials increased our overall 2018 training program cost to $12,413.

3. The quarterly newsletter was free to produce and post to our poll official web site.

4. Survey Monkey costs $384 for an annual membership. Poll officials received the survey link in an email.

- **Replicability.** I was able to present all these components of our training program to the 2018 General Election School hosted by the N.M. Secretary of State's Office. As I mentioned in that presentation, each of these components is easy to replicate to meet any county's needs. The issue for any county is certainly going to be the costs associated with online video support and IT infrastructure ability.