Best practices for envelope design

Center for Tech and Civic Life
Center for Civic Design
Vote at Home

February 13, 2020
Why we’re here
Our objectives
Objectives

You will be able to:

- Understand mail ballot envelope standards
- Adapt national templates to your office’s needs
- Implement principles of plain language and design to help voters
Agenda

- Introductions and housekeeping
- Context and overview
- National elections envelope template
- Plain language and design best practices
- Case study: Michigan’s approach
- Resources to remember
- Q&A
Hello, there!

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Harnessing the promise of technology to modernize the American voting experience

@helloCTCL
www.techandciviclife.org
Center for Civic Design (CCD)

Democracy is a design problem! We work to ensure voter intent through design.

@CivicDesign | www.civicdesign.org
civicdesign.org/projects/roadmap/
Vote at Home

The National Vote at Home Institute is dedicated to ensuring the security of our elections and putting voters' needs first by advancing vote at home practices.

@VoteatHome
www.voteathome.org
Housekeeping

- Use chat to communicate
- Update your screen name: Josh (Chicago, IL)
- Mute your audio if you aren’t speaking
Context and overview
Spotlight on envelope design
Context and Overview

- Voting by mail is an increasingly common practice in localities across the US
- Practices range across states
- Statutes and requirements shift
- Design best practices increase efficiency while helping people vote the way they intend
States with blended policies in the Step 3 – 4 – 5 range.

UT 100% VAH in 2019
HI 100% in 2020
CA targeting 2022/24

NE has 11 counties on 100% VAH for 2020

ND has 30 counties using 100% mailed-out ballot voting

OH sends absentee request forms to all 8M voters, for some elections

MI, MN & PA have a permanent absentee list, but periodically send request forms, not ballots, to voters

AL, KS, & WI offer permanent absentee status to voters with disabilities

DC offers Step 4 to its voters

https://www.voteathome.org
Statutes and requirements shift

Why you *may have to* make changes:

- state code or policy
- voting systems or options
- language requirements
- problems you’re already experiencing
- accommodate increased volume

As long as you’re making changes:

- update to align with design and plain language best practices
- add USPS tracking mechanisms
- coordinate with surrounding counties or across the state
Why make changes?

Best practices for envelope design helps:

- answer voters questions
- get signatures in the right place by the right person
- get ballots back on time
- get ballots in the right place
- get envelope packages through the mail system
The balancing act

When designing your VAH envelope package, you need to:

• follow USPS requirements
• follow state rules and guidelines
• coordinate with vendors or print in-house
• align with plain language and design best practices
Vote at home envelopes
Introducing a national template
Design solutions for voting at home
Creating a national template

Vote at home envelope template

- USPS compliant
- Recognizable
- Accurate
- Flexible
- Usable
- Legal
Creating a national template

Vote at home envelope template

Vote by mail official ballot
Why wait? Return your ballot before election day.

Contact information
Franklin County Elections
4321 Franklin Avenue
Franklin, HN 99999

www.franklincounty.gov/elections
elections@franklincounty.gov

Information in English: 111-222-3333
Information en español: 111-222-4444
Information in Chinese: 111-222-5555

Fax: 111-222-6666
TTY: 1-222-555-1222

How to return your ballot
Drop Box
Drop off your ballot at a secure drop box — no postage required.

Vote by Mail
Mail your ballot so it is postmarked by Election Day.

Vote Center
Vote at any vote center in the county.

To find the Vote Center or Drop Box nearest you
www.yourcounty.gov/wheretovote
Creating a national template

Vote at home envelope template

Return envelope
Official ballot
To be opened only by Canvassing Board

Drop off your ballot by 7pm on Election Day.
Mail your ballot so that it is postmarked by Election Day.
Creating a national template

Vote at home envelope template

Outgoing (blue)

General election return (light green)

Special election return (dark purple)
Water District Election
December 15, 2018

General election UOCAVA return
Creating a national template

Vote at home envelope template

Outgoing
- Sample ballot
- Vote-by-mail ballot

Return envelopes
- No postage paid
- BRM postage paid
- International

Polling place
- Provisional
- Replacement
- Conditional voter
Creating a national template

Vote at home envelope template
Designing your envelope system
Where to start
Designing your envelope system

Vote by mail envelope template

Questions to ask:

• Who should we bring into the conversation?

• What else goes in the VAH package?

• Should we hide or reveal the signature?

• Do we track the envelopes?
Designing your envelope system

VAH envelope package
Zoom in
Small changes for BIG impact
Zoom in: small changes for BIG impact

Wrapping color
• Use blue for outgoing envelopes.
• If possible, coordinate return colors with surrounding counties.
Zoom in: small changes for BIG impact

Wrapping color
Zoom in: small changes for BIG impact

Voter’s declaration

Did you...
☐ Sign the voter’s declaration in your own handwriting?
☐ Put your ballot in the envelope?

I authorize the person below to return my ballot:

Their name

Their signature

Relationship to voter

Franklin County
General Election
November 7, 2018

Valentina Q. Voter
5678 Seventh Ave, Apt 9863
Franklin, HN 99999-1278

Voter’s declaration
I declare that
• I am a resident of and a voter in the county, and the
  person whose name appears on this envelope.
• I have not applied, nor will I apply for a vote-by-mail ballot from
  any other jurisdiction in this election.
• I declare under penalty of perjury that this is true to the best of
  my knowledge and belief.

You must sign in your own handwriting. Your signature must
match the signature on your voter registration card.
Voting twice in an election is a crime.

Voter, sign here in ink. Power of attorney is not acceptable.

Date (MM/DD/YYYY)

Print name

Print your voter registration address

If you are unable to sign, make your mark
and have a witness sign below:
Witness, sign here
• Emphasize heading to set context.
• Use plain language when possible.
• Break dense legal information into bullet points.

Voter’s declaration

I declare that
• I am a resident of and a voter in the county, and the person whose name appears on this envelope.
• I have not applied, nor will I apply for a vote-by-mail ballot from any other jurisdiction in this election.
• I declare under penalty of perjury that this is true to the best of my knowledge and belief.

You must sign in your own handwriting. Your signature must match the signature on your voter registration card. Voting twice in an election is a crime.
I __________________ assert that I am a United States citizen and a qualified and registered elector of the city, township or village named below. I am voting as an absent voter in conformity with state election law. Unless otherwise indicated below, I personally marked the ballot enclosed in this envelope without exhibiting it to any other person. I further assert that this absent voter ballot is being returned to the clerk or an assistant of the clerk by me personally; by public postal service, express mail service, parcel post service, or other common carrier; by a member of my immediate family; or by a person residing in my household.

An absent voter who knowingly makes a false statement is guilty of a misdemeanor.

Voter’s Declaration

Voter’s name____________________

I assert that

• I am a United States citizen and a qualified and registered elector of the city, township or village named below.

• I am voting as an absent voter in conformity with state election law. Unless otherwise indicated below, I personally marked the ballot enclosed in this envelope without exhibiting it to any other person.

• I further assert that this absent voter ballot is being returned to the clerk or an assistant of the clerk by me personally; by public postal service, express mail service, parcel post service, or other common carrier; by a member of my immediate family; or by a person residing in my household.

• An absent voter who knowingly makes a false statement is guilty of a misdemeanor.

I understand that knowingly making a false statement is a misdemeanor.
Signature box

Franklin County
General Election
November 7, 2018

Valentina Q. Voter
5678 Seventh Ave, Apt 9863
Franklin, HN 99999-1278
• Address the voter directly.
• Use action verbs.
• Add an ‘X’ inside the signature box.
• Include formatting for the date.
• If people need to sign with witnesses or a notary, tell them first.
Implementing VBM envelope best practices

Zoom in: small changes for BIG impact

Checklists

Did you...
☐ Sign the voter’s declaration in your own handwriting?
☐ Put your ballot in the envelope?

Voter’s declaration
I declare that
• I am a resident of and a voter in the county, and the person whose name appears on this envelope.
• I have not applied, nor will I apply for a vote-by-mail ballot from any other jurisdiction in this election.
• I declare under penalty of perjury that this is true to the best of my knowledge and belief.

You must sign in your own handwriting. Your signature must match the signature on your voter registration card. Voting twice in an election is a crime.

Voter, sign here in ink. Power of attorney is not acceptable.

Date (MM/DD/YYYY)

Print name

Print your voter registration address

If you are unable to sign, make your mark and have a witness sign below:
Witness, sign here
Zoom in: small changes for BIG impact

Checklists

- Put instructions as close to the task as possible.
- Break up multiple tasks
- Use boxes so voters can check off each task.
- Be as specific as possible.

Did you...
☐ Sign the voter’s declaration in your own handwriting?
☐ Put your ballot in the envelope?

Revise si...
☐ ¿Firmó la declaración del votante con su propia letra?
☐ ¿Colocó su boleta electoral en el sobre?
Implementing VBM envelope best practices

Zoom in: small changes for BIG impact

Headings and icons

**Voter’s declaration** I declare that
- I am the person whose name appears on this envelope.
- I have not applied, nor will I apply for a vote-by-mail ballot from any other jurisdiction in this election.
- I declare under penalty of perjury that this is true to the best of my knowledge and belief.

You must sign in your own handwriting. Your signature must match the signature on your voter registration card. Voting twice in an election is a crime.

**Voter, sign here in ink.** Power of attorney is not acceptable.

Date (MM/DD/YYYY)
Print name
Print your voter registration address

If you are unable to sign, make your mark and have a witness sign below:
Witness, sign here

Franklin County
General Election
November 7, 2018

Valentina Q. Voter
5678 Seventh Ave, Apt 9863
Franklin, HN 99999-1278
Zoom in: small changes for BIG impact

Headings and icons

- Emphasize headings to separate sections.
- Make headings informative.
- Consider putting deadlines in multiple places, including in headings.
Case studies

Work with other states

Envelopes from left: Michigan, county in IL, Lassen County, CA, Orange County, CA
Case studies

Work with other states
Case study
Creating an envelope system in Michigan
Case studies

Michigan
Case studies

Michigan’s outgoing envelope

Implementing VBM envelope best practices | 45
Implementing VBM envelope best practices

Case studies
Michigan’s return envelope

Sample City Elections Department
4821 Franklin Avenue
Sample, MI 44444-1234

Return envelope
Official ballot
To be opened only by the Precinct or Absent Voter Ballot Counting Board.

Keep your ballot secure.
It is felony for anyone to be in possession of an absent voter ballot except authorized election officials, employees of postal services or other common carriers during the normal course of their job handling mail, or a member of the voter’s immediate family or household who the absent voter has asked to return the ballot.

Don’t forget to sign on the back.
Drop off or mail your ballot so that it is returned by 8pm on Election Day.
Track your ballot at mi.gov/vote.

Sample City
4321 Franklin Avenue
Sample, MI 44444-1234

For Clerk’s use only
Return date and time
Signature verified?
Rejected?
Reason
Precinct
Ballot

Did you...
- Sign in the box below in your own handwriting?
- Put your ballot in the envelope?
- Return to local clerk before 8 p.m. on Election Day?

I assert that:
- I am a United States citizen.
- I am qualified and registered to vote at the address listed.
- I am voting in conformity with state election law.
- I marked my ballot and placed it in this envelope without showing it to anyone.
- I am returning my ballot to the clerk’s office by delivering it myself or a member of my immediate family or household, or sending it by public postal, express mail, or parcel post service, or other common carrier.

I understand that knowingly making a false statement is a misdemeanor.

Voter, sign here in ink. Power of attorney is not acceptable.

This box must be signed or your vote will not be counted.

If someone assists you or helps you mark your ballot, they must sign and identify themselves.

I assisted the voter who is disabled or unable to mark his/her ballot according to his/her directions and without showing it to another person.

Assistant, sign here

Print name
Print full address

A person who assists an absent voter and knowingly makes a false statement is guilty of a felony.
Case studies

Michigan’s UOCAVA outgoing envelope
Case studies

Michigan’s UOCAVA return envelope
Case studies

Michigan’s flyer for USPS

There’s a new look in 2020 for ballot mail envelopes in Michigan
Help us get ballots delivered to the voters and back to the clerk’s office – quickly and accurately.

Blue envelopes are for delivery to voters
- The new envelopes are smaller and color coded, blue goes to the voter.
- The delivery address is clearly labeled on the front.

Green envelopes return ballots to the Clerk
Front of envelope
- Green denotes delivery to the clerk’s office.
- The clerk’s address and IMb are clear on the front of the envelope.

Back of envelope
- This side is for the voter’s use only.
- Do not deliver to the voter’s address on the back.

Together, we can make the 2020 elections a success.
Have questions, contact the Michigan Bureau of Elections (517) 335-3237 or elections@michigan.gov.
Case studies
Michigan’s voter insert

Absent Voter Ballot Mail Envelopes - New for 2020
The Absent Voter Ballot envelopes have a new look redesigned to meet USPS standards. You will receive this blue envelope containing your ballot starting with the March Presidential Primary.

Dates To Remember:
- **Friday, March 6** request your Absentee Ballot by mail until 5:00 pm
- **Monday, March 9** receive your absentee ballot in person in the Clerk’s Office until 4:00 pm

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Resources
Resources

**VBM workbook**

Layouts and design guidelines

[https://civicdesign.org/fieldguides/104-designing-vote-at-home-envelopes/](https://civicdesign.org/fieldguides/104-designing-vote-at-home-envelopes/)

**Field Guides to Ensuring Voter Intent**

Design guidelines based on solid research and best practices

[https://civicdesign.org/fieldguides/](https://civicdesign.org/fieldguides/)

**Usability testing toolkit**

Tools and resources for getting feedback from voters, poll workers, and other users.

[https://electiontools.org/tool/usability-testing-kit/](https://electiontools.org/tool/usability-testing-kit/)

**Civic icons and images**

Visual resources for election materials

How can we help?

- Answer questions
- Provide feedback and support for integrating envelope best practices

Reach out to Maggie at CCD: maggie@civicdesign.org
Q&A

● What practices will be useful to you?
● Any questions about today’s topic?
● What additional support would be helpful?
Preparing helpful supplementary materials
Tuesday, February 18th
2:00 pm – 3:00 pm EST

Integrating low-cost tracking and reporting tools
Thursday, February 20th
2:00 pm – 3:00 pm EST

Register: techandciviclife.org/vote-at-home