

# 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!



Maggie Ollove
Center for Civic Design
maggie@civicdesign.org



Josh Simon Goldman Center for Tech and Civic Life josh@techandciviclife.org



**Virginia Vander Roest**Michigan Bureau of Elections



# Center for Tech and Civic Life (CTCL)

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

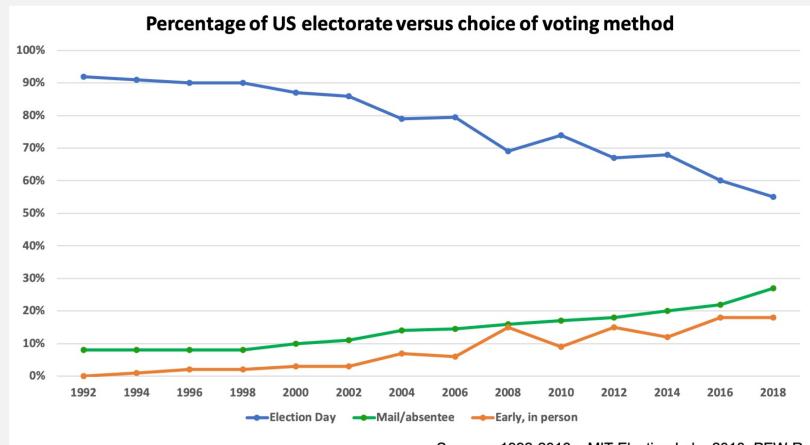
- Use chat to communicate
- Update your screen name: Josh (Chicago, IL)
- Mute your audio if you aren't speaking

# **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



Sources: 1992-2016:: MIT Election Lab. 2018: PEW Research

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

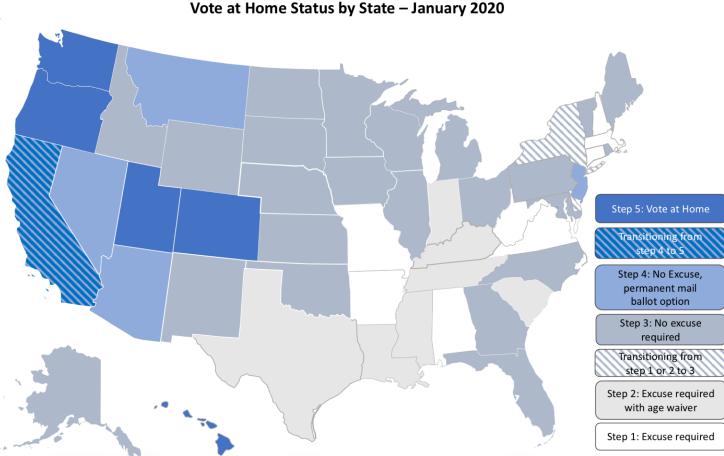
ND has 30 counties using 100% mailed-out ballot voting

**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



# 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

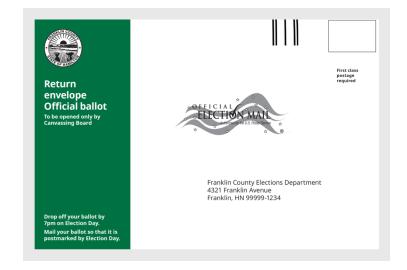
# Vote at home envelopes

Introducing a national template

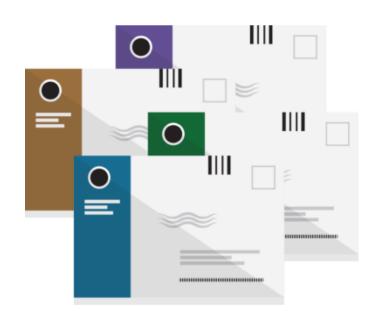
# **Design solutions**

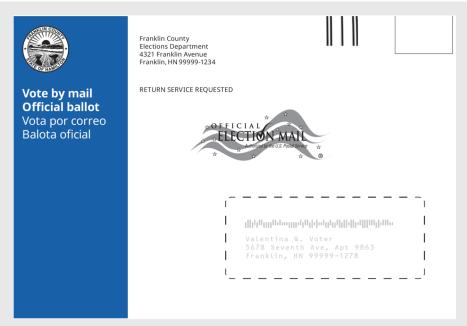
# for voting at home

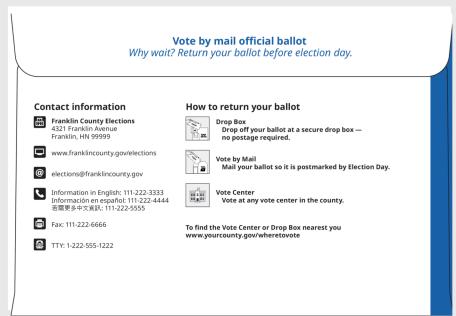


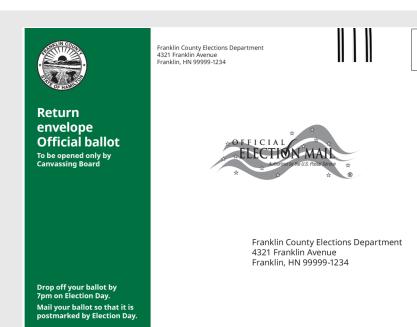


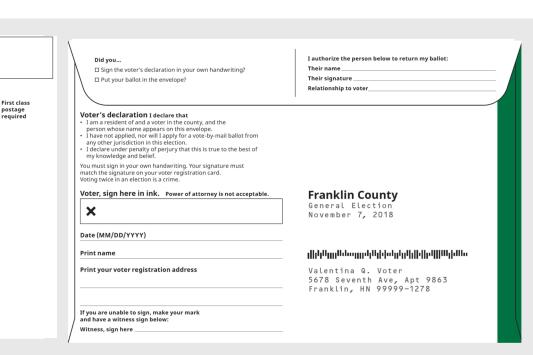
- USPS compliant
- Recognizable
- Accurate
- Flexible
- Usable
- Legal













Outgoing (blue)



General election return (light green)



General election UOCAVA return



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

# Vote at home envelope template

### **Outgoing**

- Sample ballot
- Vote-by-mail ballot

### **Return envelopes**

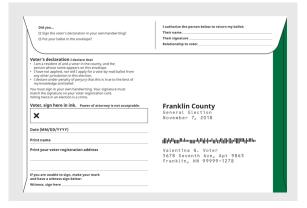
- No postage paid
- BRM postage paid
- International

### **Polling place**

- **Provisional**
- Replacement
- Conditional voter



COUNTY SEAL Franklin County Elections 4321 Franklin Avenue Franklin, CA 99999-1234	
Official ballot return envelope To be opened only by Canvassing Board.	
	ELECTION MAIL
Valentina Voter 5678 MLK Avenue Franklin, CA 99999-1234	BUSINESS REPLY INSIGNIA
Print your name	Franklin County Elections Department 4321 Franklin Avenue
Address	Franklin, CA 99999-1234
City State Zip	



□ Put your b Revise si □ ¿Firmó la d	oter's declaration allot in the env declaración del boleta elector	elope?	con su pr			Call the 111-222 ¿Comet Llame a	tió un error en su	a replacement @yourcounty.gov boleta electoral? al para un reemplazo	Lauthorize the person below to return my ballot: Autorizo a la persona abajo a devolver mi boleta: Their name / Su nombre Their signature / Su firma Relationship to voter / Relación con el votante
If you are unable to sign, make and have a witness sign below Si usted no puede firmar, haga a y haga que un testigo firme abaj	Print your voter registration address Imprime tu dirección de registro de vot	Print name / Imprimir nombrete	Date / Fecha (MM/DD/YYYY)	×	Voter, sign here in ink. Votante, firme aquí con tinta Power of attorney is not acceptable. No se aceptan poderes notariales.	Debe firmar de puno y letra. Su firma debe coincidio con la firma en la tarjeta de inscripción del votante. Votar dos veces en una elección es un crimen.	Declaración del votante el soy residente y otante el soy residente y otante el persona cuyo nombre apo persona cuyo nombre al solicitado, ni solicit por correo de ninguna orro Declaro bajo pena de persona cuyo pena de persona mi leal saber y entender	Voter's declaration (sector that  I man a resident of and a voter in the county, person whose name appears on this envelope  I have not applied, nor will apply for a vote basiled from any other jurisdiction in this set texture under pensity of perjury hast this is texture under pensity of perjury hast this is texture under pensity of perjury hast this is to the text of my homeledge and belief to must signify one your homeledge and belief to must signify one your homeledge and select you're declared to great the county of the pensity you're provided the significant on your voter regist you're greated to be a clima.	Franklin County General Election November 7, 2018
n, make your mark below: . haga una marca me abajo:	ration address / registro de votante 数	nombrete	(AAAA)		nk. on tinta ceptable. riales.	Su tirma debe coincidir nscripción del votante. ión es un crimen.	Declaración del vortante vo deciaro que:  Soy residente y volunte en el cordado y la persona curpo nomine aparece en este sobre.  No has solicados n. nacilicate sina blocita el escreta de voto por correo de ninguna cira jurisdicción en esta elección.  Declaro bajo pena de perjurio que esto es verdadero ami leal saber y entender.	Lone a relatent dend a wort in the county, and the person whose name appears on this envelope.  I have not applied, nor will tapply for a voet by-mail bailed from any other jurisdiction in this election in this election in the election is crime.	

# Designing your envelope system

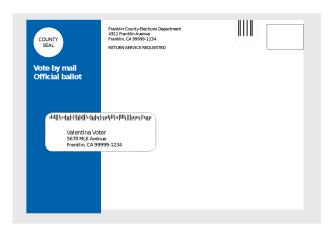
Where to start

### Designing your envelope system

# Vote by mail envelope template

## Questions to ask:

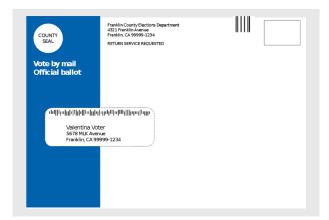
- Who should we bring into the conversation?
- What else goes in the VAH package?
- Should we hide or reveal the signature?
- Do we track the envelopes?



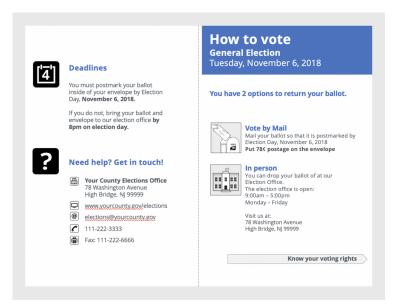
i authorize the person below to return my ballot: Autorizo a la persona abajo a decover ni boleta: Their name / Su nombre Their signature / Su lirne Relationship to water / Relación con el votante	Did you  Disgn the voter's declaration in your own handwriting?  Det your ballot in the envelope?  Revise sl  Dism'on is declaración del votante con ou propia letra?  Colocid su boleta electoral en el sobre?
oter's declaration I declare that I am a resident of and a voter in the county, and the person whose name appears on this ervelope. I have not applied, nor will lapply for a vote-by-mail ballot from any other jurisdiction in this clerificant in the best of myst howinding and belief.	Declaración del votante Yo declaro que:  Soy residente y votante en el condodo, y la persona cuyo nombre aprece en estés obbe.  No he solicitado, si solicitado una boleta electoral de voto por corre de ninguas ota plasificación en esta election.  Declaro bajo pena de perjurio que esto es verdadero a mi leal saber y entender.
ou must sign in your own handwriting. Your signature must match the ignature on your voter registration card.	Debe firmar de puño y letra. Su firma debe coincidir con la firma en la torieta de inscripción del votante.
-	Votar dos veces en una elección es un crimen.
/oter, sign here in ink. Power of attorney is not acceptable.	Votar dos vecas en una elección as un crimen.  Franklin County
Voter, sign here in ink. Votante, firme aqui con tinta  No se acceptae podores notariales.	
/otante, firme aquí con tinta No se aceptan poderes notariales.	
//oter, sign here in ink. //otante, firme aqui con tinta  X  //otante / Fecha (MM/DB/YYYY)	
// Power of attorney is not acceptable. Notante, firme aqui con tinta to se acceptable and see acceptable acce	

### Designing your envelope system

# **VAH** envelope package





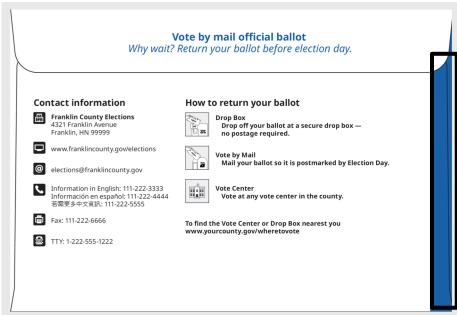


# **Zoom in**

Small changes for BIG impact

# Wrapping color





# Wrapping color

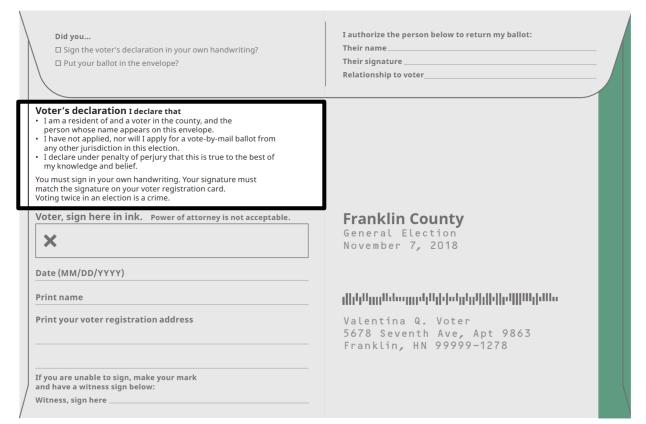
- Use blue for outgoing envelopes.
- If possible, coordinate return colors with surrounding counties.



# **Wrapping color**



## **Voter's declaration**



## **Voter's declaration**

- 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.

## **Voter's declaration**

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

### Lassert 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.
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### **Voter's Declaration**

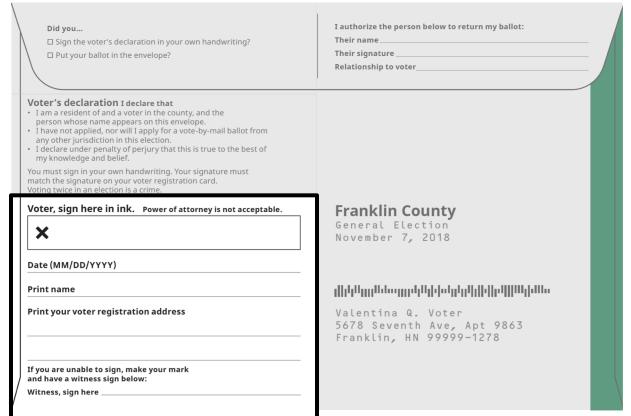
Voter's name_	
---------------	--

### Lassert that

- Lam a United States citizen
- I meet all of the requirements to vote
- I am registered to vote at the address listed below
- 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

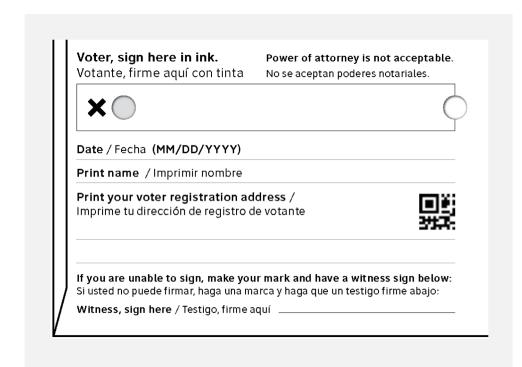
I understand that knowingly making a false statement is a misdemeanor.

# **Signature box**



# Signature box

- 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.



## **Checklists**

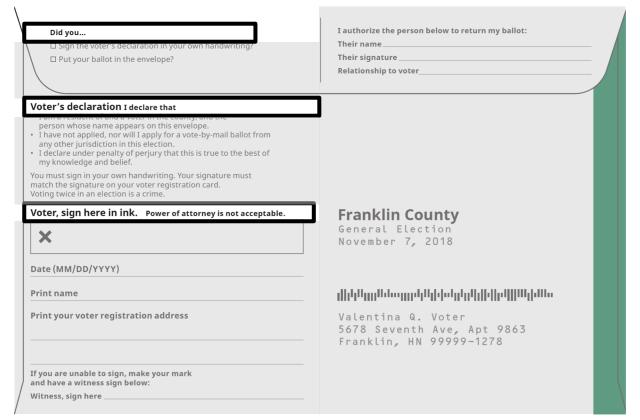


## **Checklists**

- 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.

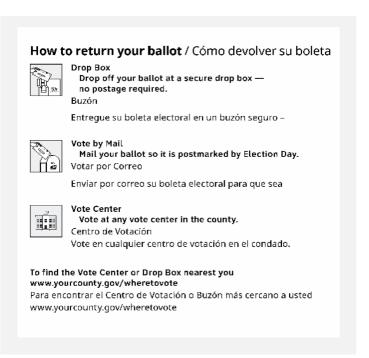
## Did you... ☐ Sign the voter's declaration in your own handwriting? ☐ Put your ballot in the envelope? Revise si... ☐ ¿Firmó la declaración del votante con su propia letra? ☐ ¿Colocó su boleta electoral en el sobre?

# **Headings and icons**



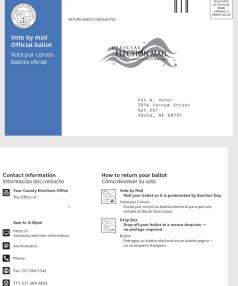
## **Headings and icons**

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

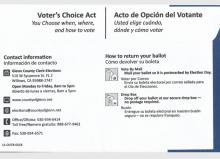


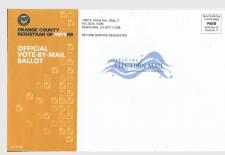
## Work with other states





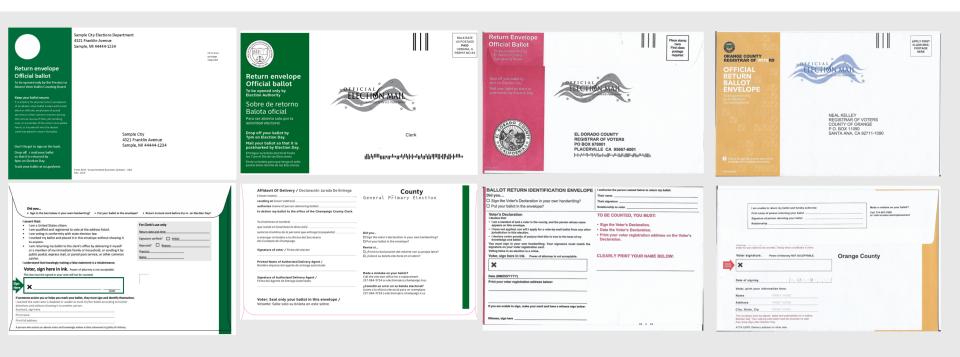








## Work with other states



# **Case study**

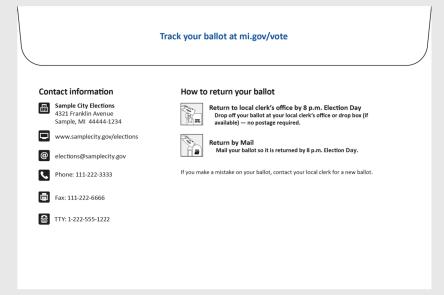
Creating an envelope system in Michigan

## **Case studies** Michigan



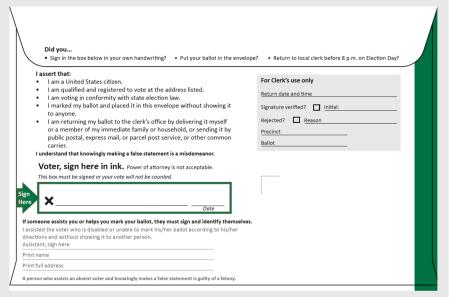
# Michigan's outgoing envelope



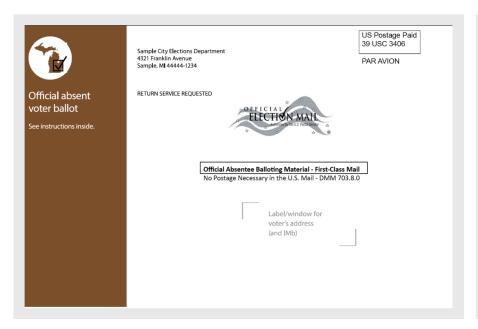


## Michigan's return envelope





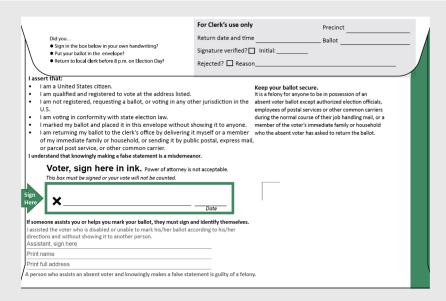
# Michigan's UOCAVA outgoing envelope





## Michigan's UOCAVA return envelope





## 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
- · 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.

## 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



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## Resources

## Resources



### **VBM** workbook

Layouts and design guidelines

https://civicdesign.org/fieldguides/104-designing-vote-at-home-envelopes/



### **Usability testing toolkit**

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

https://electiontools.org/tool/usability-testing-kit/



# Field Guides to Ensuring Voter Intent

Design guidelines based on solid research and best practices

https://civicdesign.org/fieldguides/



## Civic icons and images

Visual resources for election materials

<u>electiontools.org/tool/civic-icons-</u> and-images/

## How can we help?

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

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





- What practices will be useful to you?
- Any questions about today's topic?
- What additional support would be helpful?



## See you on 2/18 and 2/20

# **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