Best practices for tracking and reporting

Center for Tech and Civic Life

Center for Civic Design

National Vote at Home Institute

February 20, 2020

Why we're here

Our objectives

Objectives

You will be able to:

- Try out tools for tracking ballots through the mail and at your office
- Get access to high priority support from the USPS
- Explore best practices for signature verification and voter intent
- Learn how to test your vote at home package so that you can have confidence that it works

Agenda

- Introductions and housekeeping
- Context and overview
- Tools for your office
  - Tracking
  - Troubleshooting
  - Verifying
  - Curing
  - Testing
- Resources to remember
- Q&A

Hello, there!

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Center for Technology 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

Voting by mail, voting at home

Context and Overview

- Voting by mail is an increasingly common practice in localities across the US
- Practices range across states
- Design best practices increase efficiency while helping people vote the way they intend
- Statute and requirements shift

Percentage of US electorate versus choice of voting method
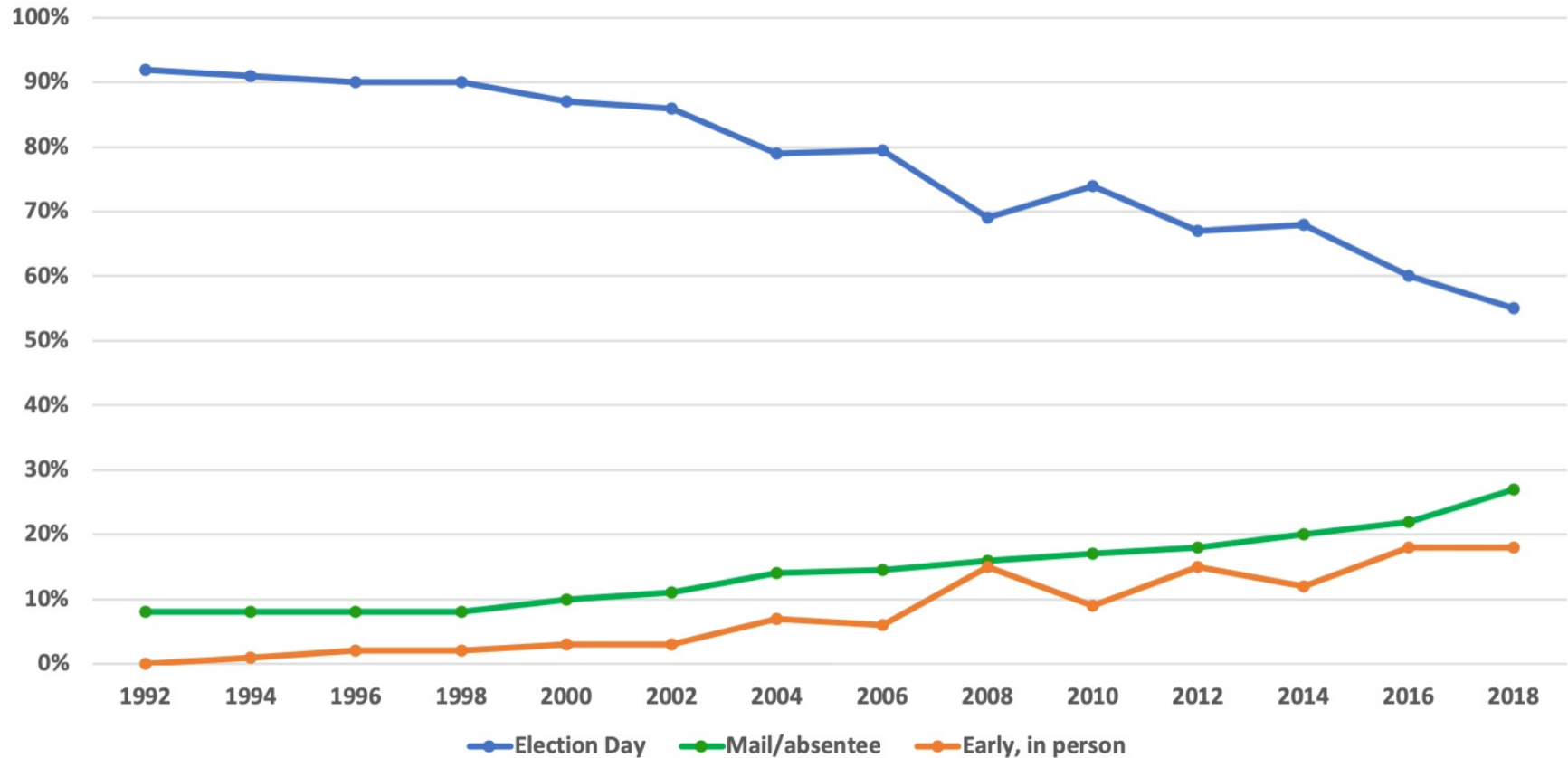
Sources: 1992-2016, MIT Election Lab; 2018: Pew Research

Vote at Home Status by State – January 2020

States with blended policies in the Step 3 – 4 – 5 range.

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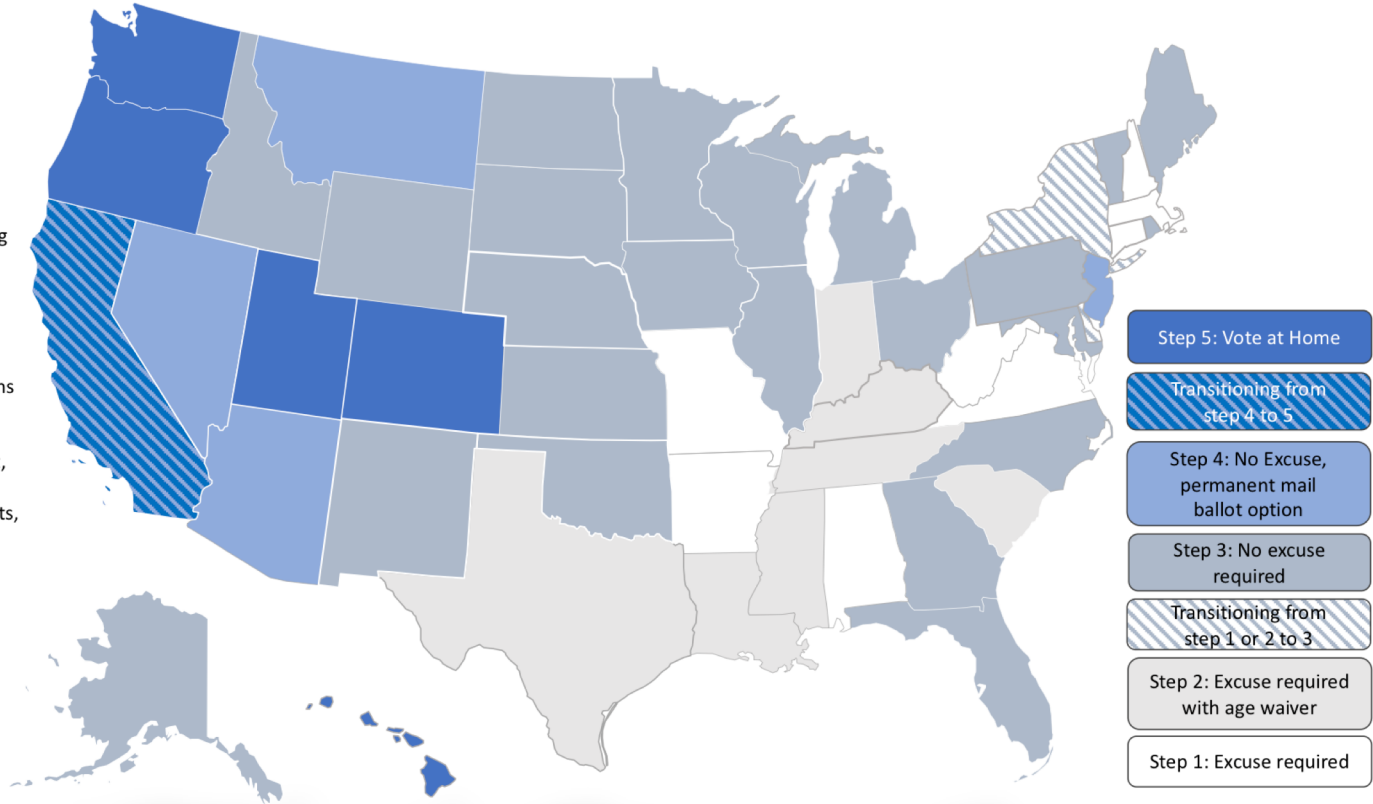**CA** targeting 2022/24

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

Step 5: Vote at Home

Transitioning from step 4 to 5

Step 4: No Excuse, permanent mail ballot option

Step 3: No excuse required

Transitioning from step 1 or 2 to 3

Step 2: Excuse required with age waiver

Step 1: Excuse required

Source: https://www.voteathome.org

Why make changes?

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:

- *add USPS tracking mechanisms*
- *Integrate tools to build voter confidence*

Why make changes?

Good tools for tracking and reporting could help:
- answer voters questions
- get ballots back on time
- get ballots in the right place
- get envelope packages through the mail system
- monitor and resolve issues
- reduce strain on office staff

Track
Troubleshoot
Verify
Cure
Test

Precision
In the mail and at the office

Track

- One-way and round-trip USPS tracking

- Building voter trust with Ballot Scout

An example from industry

Delivery by Amazon

Tracking ID: TBA738342123000

Saturday, January 25

| 11:36 AM | Delivered |
| | *Chicago, US* |

| 10:21 AM | Out for delivery |
| | *Skokie, US* |

Friday, January 24

| 11:16 PM | Package arrived at a carrier facility |
| | *Skokie, US* |

| 7:00 PM | Package departed an Amazon facility |
| | *Kenosha, WISCONSIN US* |

| 10:34 AM | Package arrived at an Amazon facility |
| | *Kenosha, WISCONSIN US* |

| | Package has shipped |
| | *Whitestown, IN US* |

Times are shown in the local timezone.

Barcodes (IMb) make it happen

Barcodes make it happen

- Ballot-specific Service Types IDs (STID)
- Intelligent Mail Barcodes (IMb)

Barcodes and election envelopes

Outgoing envelope
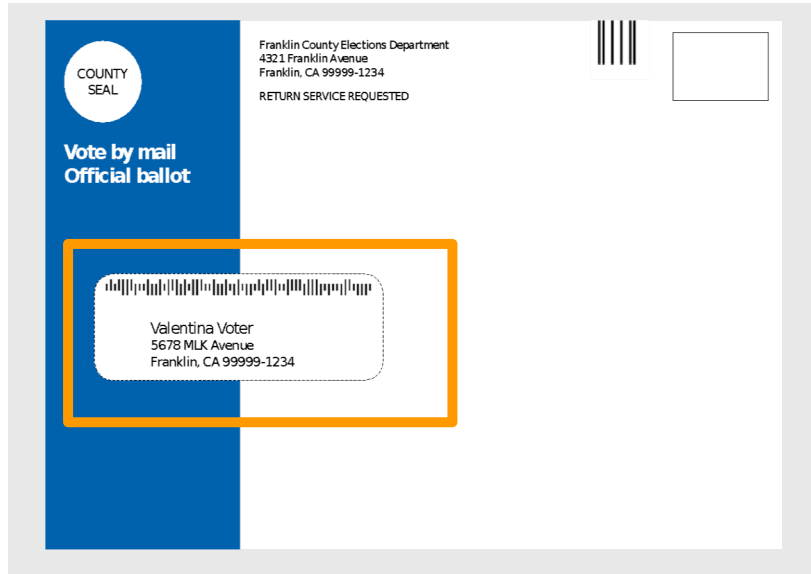
Return envelope
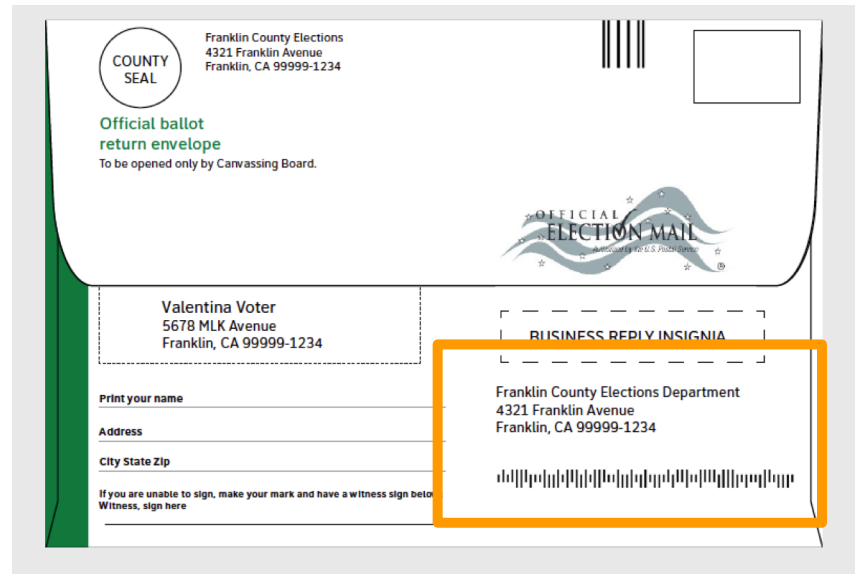
Ballot Scout

- Web based mail ballot tracking tool using USPS Intelligent Mail barcodes and tracking data
- Provides election administrators and voters with a way to monitor ballots as they move through the mail stream
- Making tracking data accessible provides clarity, accountability, and can help streamline other election processes

Administrator's Dashboard
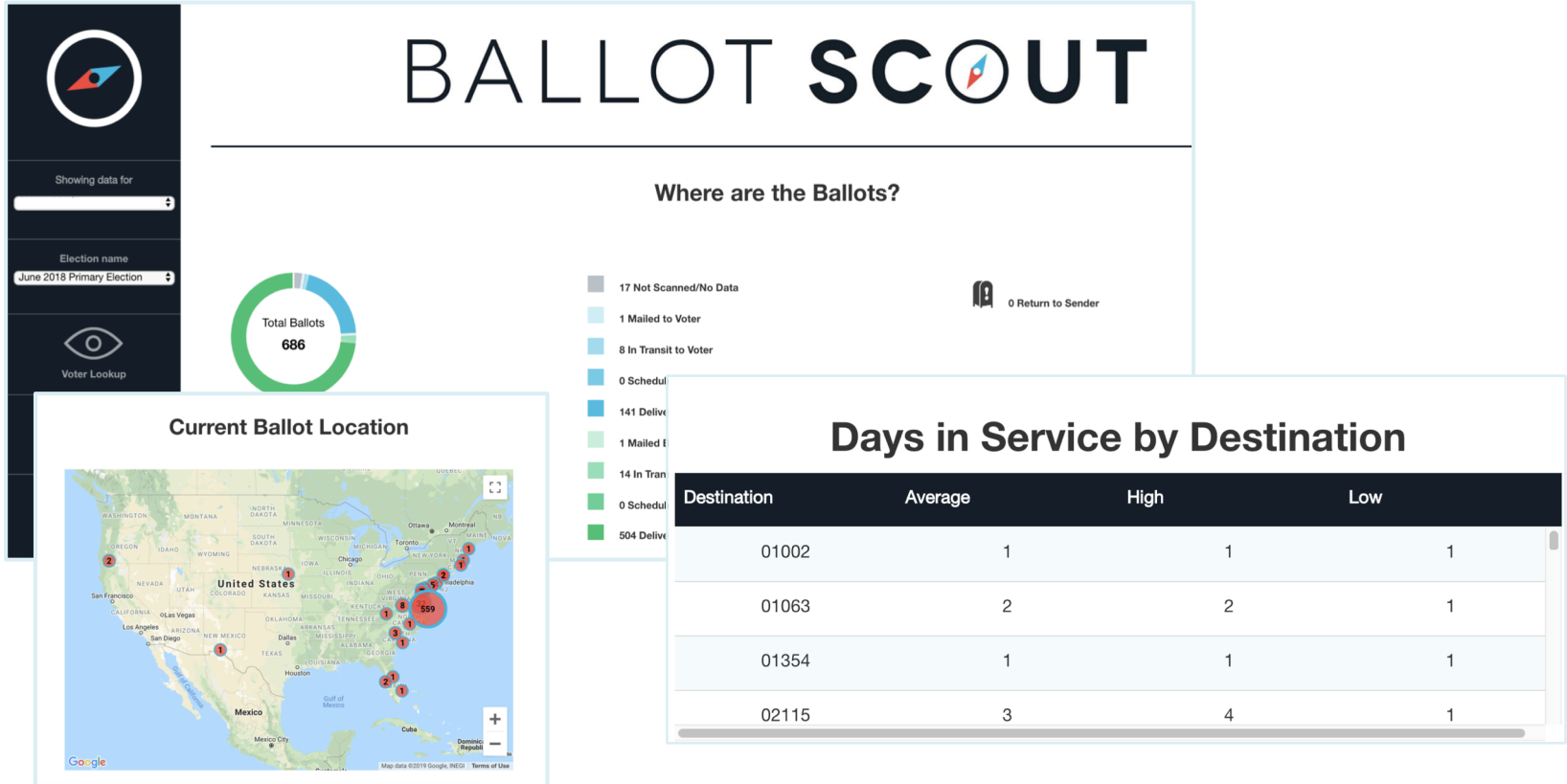
Administrator's Dashboard

Date Created ▲	Voter Name ▲▼	Voter Address ▲▼	Current Ballot Status ▲▼	Last Scan Received ▲▼	Outbound Delivery Date ▲▼	Inbound Delivery Date ▲▼	Full Scan History
2018-10-01	Jessenia Eliza	2110 SE Main St Portland, OR 97214-3840	Received	2018-10-13 18:00 CST Lawrence, KS			View History
2018-10-04	Jessenia6 Eliza6	2110 SE Main St Portland, OR 97214-3840	Delivered	2018-10-09 01:29 CST PORTLAND, OR	2018-10-09 5 days in service		View History
2018-10-06	JesseniaTEST ElizaTEST	2110 SE Main St Portland, OR 97214-3840	Received	2018-10-13 18:00 CST Lawrence, KS	2018-10-10 4 days in service		View History

Administrator's Dashboard

Date Created	Voter Name	Voter Address	Current Ballot Status	Last Scan Received	Outbound Delivery Date	Inbound Delivery Date
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214-3840	Not yet mailed			
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214-3840	Mailed to voter	2018-10-04 18:00 CST Lawrence, KS		
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214-3840	In transit to voter	2018-10-04 20:28 CST KANSAS CITY, MO		
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214-3840	Delivered	2018-10-06 16:33 CST PORTLAND, OR	2018-10-09 5 days in service	

Answer voters' questions

- When will I get my ballot?

- Has my ballot arrived back to the election office?

- I didn't get my ballot, where is it?

Voter transparency
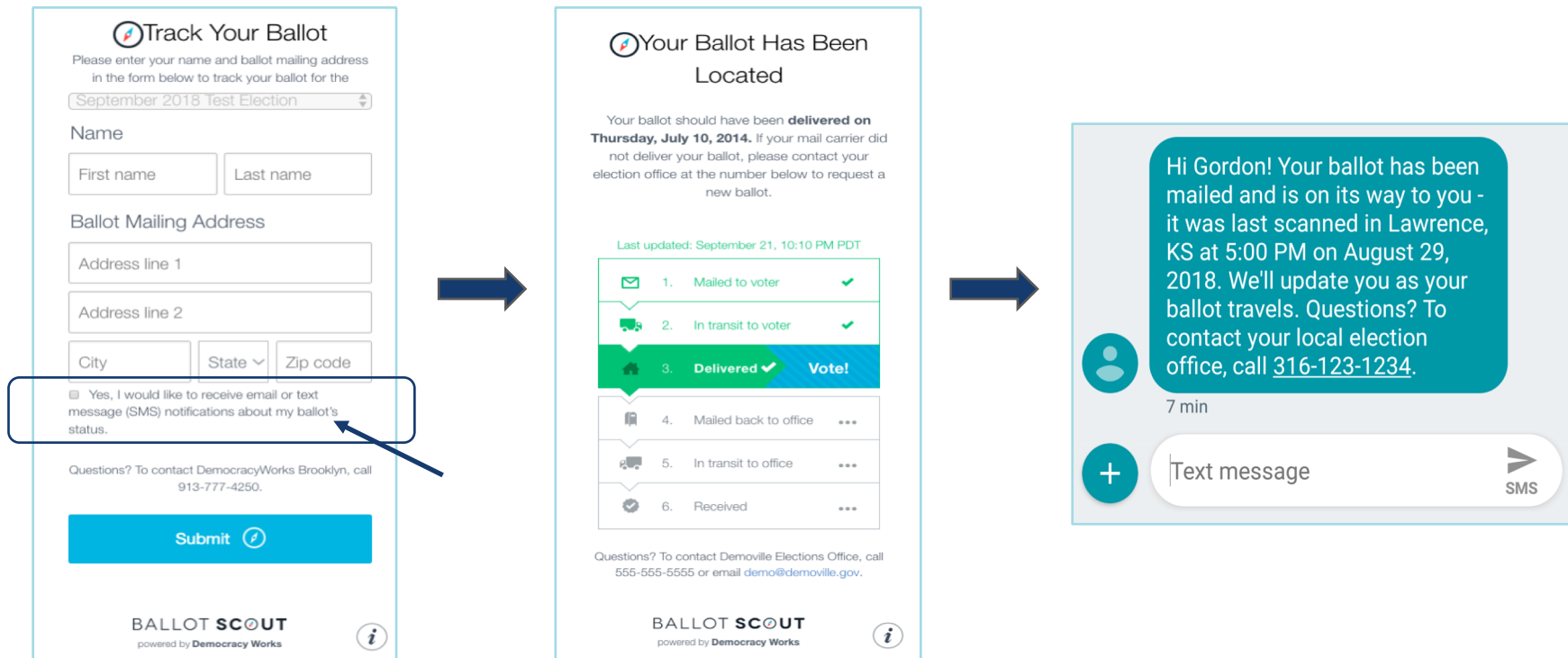
Setting it up

- Timeline

- Costs based on variety of factors, especially size

- Jessenia Eliza is your point of contact:

    Jessenia@democracy.works

    916.241.3876

Troubleshoot

- **ElectionMail.org**
    - For election officials
    - Detailed reporting
    - Connected directly to USPS issue management system
    - Monitored by USPS leadership
    - Gives "bird's-eye view" for long term improvement

- And, contact your local post office

ElectionMail.org

ELECTIONMAIL.ORG   REPORT A PROBLEM / BALLOT SERVICE TYPE IDS / ELECTION MAIL RESOURCES / ABOUT THIS SITE

REPORT A PROBLEM WITH ELECTION MAIL

Local and state election officials may use this form to report past or current issues with official Election Mail processed by the United States Postal Service. This form is intended as a supplement to official reporting, and should not replace communication with your local post office.

If you are a voter, please contact your local election official.

Name *

First | Last

Email * | **Phone** *

Address *

Address Line 1

Address Line 2

City | State | Zip Code

Please include your 5-digit zip code, so that your issue can be routed to the appropriate Election Mail Specialist.

Election Jurisdiction *

Please include county/parish/city/town/township/municipality/village/borough along with the name.

What type of delivery does this issue impact?: *
- ◯ Mail being sent by the election official to the voter
- ◯ Mail being returned by the voter to the election official
- ◯ Both sent and returned mail

ElectionMail.org

What type of delivery does this issue impact?: *
- ○ Mail being sent by the election official to the voter
- ○ Mail being returned by the voter to the election official
- ○ Both sent and returned mail

What category of mail does this issue impact?: *
- ○ Domestic mail
- ○ UOCAVA mail
- ○ Both domestic & UOCAVA

What type of problem are you reporting?
- ☐ Delivery delay
- ☐ Damaged mail
- ☐ Mail not received
- ☐ Undeliverable/returned mail
- ☐ Addressing/CASS/NCOA
- ☐ Rate/class qualification
- ☐ Postmarking/cancellation
- ☐ Misdelivered mail
- ☐ Intelligent Mail tracking
- ☐ Communication with the USPS
- ☐ Other
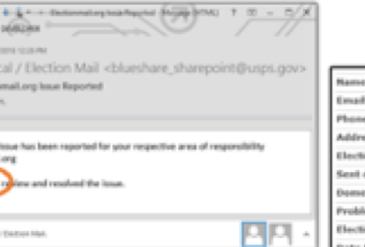
Select all that apply.

ElectionMail.org

Delivery times

- First-Class Mail
  - **2-5 day delivery (contiguous 48 US states)**
  - Personal, handwritten, or typed info
  - Free forwarding and return
  - Sealed against inspection
- Standard Mail
  - **3-10 day delivery (contiguous 48 US states)**
  - No personal, handwritten, or typed information
  - Forwarding/return require endorsement and a fee
  - May be opened for postal inspection

Business Reply Mail

- BRM can add time to the return of the ballots for the attribution to their account—remember to put additional time into voter instructions!
- USPS sweeps the processing plants/offices for ballots leading up to the return deadline. If you are using BRM, remember to ask that BRM is included in the sweep!

Tag 191s

- Add to visibility in post office facilities
- Request online: https://about.usps.com/gov-services/election-mail/

USPS Election Mail Page

CENTRAL ILLINOIS

District Name	CENTRAL ILLINOIS
District ID	604
Area Name	GREAT LAKES
Area ID	4J
State	IL
ZIP3s Served	601, 603, 604, 605, 613, 614, 615, 616
District Lead Name	Cathy Meeks
District Lead Phone	(708) 563-7772

Verify

- Sorter software
- By hand with guidelines (via bipartisan teams)
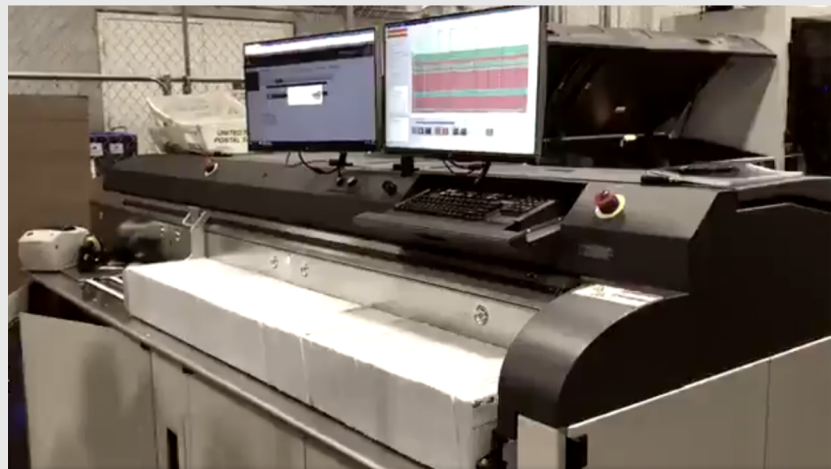
Sorting software

- Sorting software scans the signature, compares it to copy on file, and computes a percentage showing how close the match is
- Generally, election officials can determine the minimum percentage to approve a signature (e.g. 95%)
- Depending on settings, it's common for 30% to 40% of ballots to be automatically sorted
- The rest? Reviewed by hand
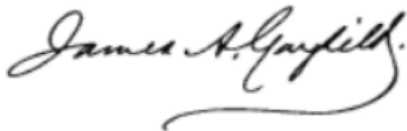
By hand

- Typically well-trained, bipartisan teams
- Good guidelines are crucial

Overall Spacing

Writing a signature is a fixed and subconscious habit, so the signature's spacing should be reasonably similar. Determine whether the ballot-envelope's signature has odd or unnatural spacing that cannot be reasonably explained.

Genuine Signature	Questioned Signature
James A. Garfield.	*James A Garfield*
John Adams.	*John Adams*

Cure

- Standard options are good…
  - In person (office)
  - In person (polls)
  - Mail
  - Fax
- Additional options can be helpful…
  - Email
  - Text

Denver Text2Cure
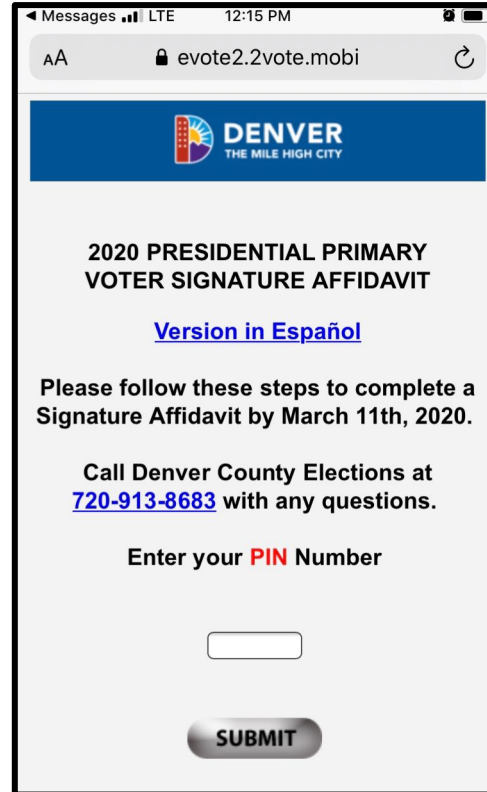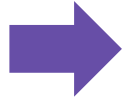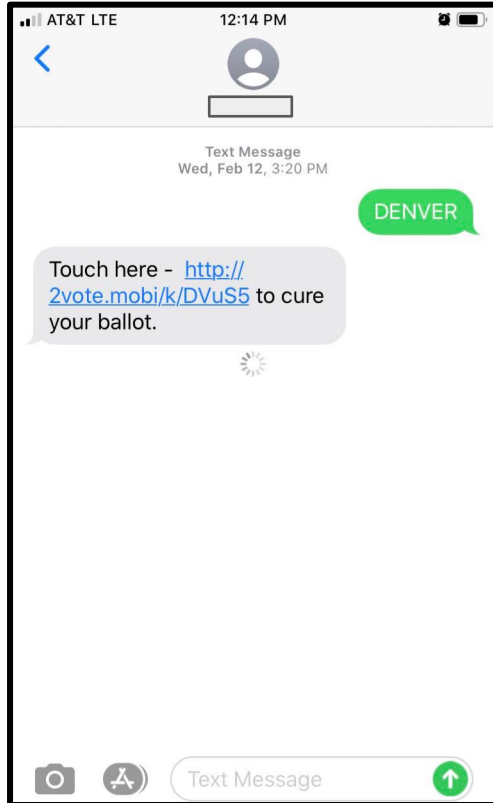
Test

Tool for learning where people using a design encounter frustration.

Usability testing helps you:

- learn what to do to make a better design
- observe where voters find difficulty
- learn about your voters
- design for people who would have the hardest time
- make sure packages make it through the mail

Test

Observe users while they move through tasks.

1. Ask voters to try your material

2. Watch and listen to learn what's working well and what's not

3. Use insights to make improvements to your design

4. Then, test again!

Test

Insights from usability test:

- where and how to clarify instructions
- small changes for how to make envelopes work with different machines or manual processes
- confirmation on what worked well
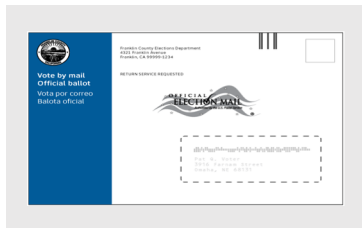
Resources

VBM workbook

Layouts and design guidelines

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

Civic icons/images

Visual resources for election materials

electiontools.org/tool/civic-icons-and-images/

Usability testing toolkit

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

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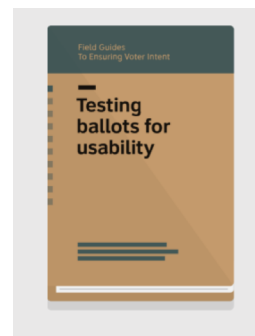
Field guides

Design guidelines, based on solid research and best practices

https://civicdesign.org/fieldguides/

Resources
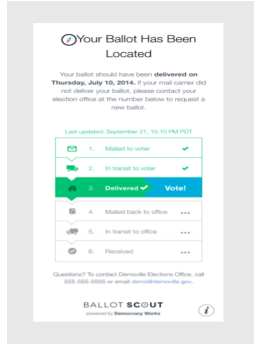
Ballot Scout

Mail ballot tracking tool
https://www.democracy.works/ballot-scout

ElectionMail.org

Report postal system issues directly
https://electionmail.org/

USPS District Lead

Look up your local point of contact
https://about.usps.com/gov-services/election-mail/political-mail-map.htm

Tag 191s

Ensure election mailings stand out in USPS facilities
https://about.usps.com/gov-services/election-mail/

Signature Guidelines

State verification guidelines from Colorado
https://www.sos.state.co.us/pubs/elections/docs/SignatureVerificationGuide.pdf
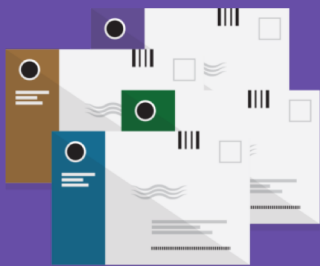
How can we help?

- Answer questions
- Provide feedback and support for running usability tests.

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

Q&A

- What's worked well for you?
- What could work better/what is your current challenge?
- What additional support would be helpful?

Thank you!

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