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!

Maggie Ollove
Center for Civic Design
maggie@civicdesign.org

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

Jessenia Eliza
Democracy Works

Tammy Patrick
Democracy Fund

Maggie Ollove
Center for Civic Design
maggie@civicdesign.org
Center for Technology and Civic Life (CTCL)

Harnessing the promise of technology to modernize the American voting experience

@helloCTCL
www.techandciviclife.org
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
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

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
● One-way and round-trip USPS tracking
● Building voter trust with Ballot Scout
USPS round trip tracking

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.
USPS round trip tracking
Barcodes (IMb) make it happen
USPS round trip tracking

Barcodes make it happen

- Ballot-specific Service Types IDs (STID)
- Intelligent Mail Barcodes (IMb)
USPS round trip tracking
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

**BALLOT SCOUT**

Where are the Ballots?

- Total Ballots: 686

**Current Ballot Location**

**Days in Service by Destination**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Average</th>
<th>High</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>01002</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>01063</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>01354</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>02115</td>
<td>3</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>
## Administrator’s Dashboard

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Voter Name</th>
<th>Voter Address</th>
<th>Current Ballot Status</th>
<th>Last Scan Received</th>
<th>Outbound Delivery Date</th>
<th>Inbound Delivery Date</th>
<th>Full Scan History</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-10-01</td>
<td>Jessenia Eliza</td>
<td>2110 SE Main St</td>
<td>Received</td>
<td>2018-10-13 18:00</td>
<td>2018-10-09 01:29 CST</td>
<td>2018-10-09</td>
<td>View History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Portland, OR 97214-3840</td>
<td></td>
<td></td>
<td>Lawrence, KS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018-10-04</td>
<td>Jessenia6 Eliza6</td>
<td>2110 SE Main St</td>
<td>Delivered</td>
<td>2018-10-09 01:29 CST</td>
<td>PORTLAND, OR</td>
<td>5 days in service</td>
<td>View History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Portland, OR 97214-3840</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018-10-06</td>
<td>JesseniaTEST Eliza</td>
<td>2110 SE Main St</td>
<td>Received</td>
<td>2018-10-13 18:00</td>
<td>2018-10-10</td>
<td>4 days in service</td>
<td>View History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Portland, OR 97214-3840</td>
<td></td>
<td></td>
<td>Lawrence, KS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Administrator’s Dashboard

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Voter Name</th>
<th>Voter Address</th>
<th>Current Ballot Status</th>
<th>Last Scan Received</th>
<th>Outbound Delivery Date</th>
<th>Inbound Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JesseniaEliza6</td>
<td>2110 SE Main St, Portland, OR 97214 3840</td>
<td>Not yet mailed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>JesseniaEliza6</td>
<td>2110 SE Main St, Portland, OR 97214 3840</td>
<td>Mailed to voter</td>
<td>2018-10-04 18:00 CST Lawrence, KS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>JesseniaEliza6</td>
<td>2110 SE Main St, Portland, OR 97214 3840</td>
<td>In transit to voter</td>
<td>2018-10-04 20:28 CST KANSAS CITY, MO</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>JesseniaEliza6</td>
<td>2110 SE Main St, Portland, OR 97214 3840</td>
<td>Delivered</td>
<td>2018-10-06 16:33 CST PORTLAND, OR</td>
<td>2018-10-09</td>
<td>5 days in service</td>
</tr>
</tbody>
</table>
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
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
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
- Misdistributed mail
- Intelligent Mail tracking
- Communication with the USPS
- Other

*Select all that apply.
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/
<table>
<thead>
<tr>
<th>District Name</th>
<th>CENTRAL ILLINOIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>District ID</td>
<td>604</td>
</tr>
<tr>
<td>Area Name</td>
<td>GREAT LAKES</td>
</tr>
<tr>
<td>Area ID</td>
<td>4J</td>
</tr>
<tr>
<td>State</td>
<td>IL</td>
</tr>
<tr>
<td>ZIP3s Served</td>
<td>601, 603, 604, 605, 613, 614, 615, 616</td>
</tr>
<tr>
<td>District Lead Name</td>
<td>Cathy Meeks</td>
</tr>
<tr>
<td>District Lead Phone</td>
<td>(708) 563-7772</td>
</tr>
</tbody>
</table>
- 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.

<table>
<thead>
<tr>
<th>Genuine Signature</th>
<th>Questioned Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Signature" /></td>
<td><img src="image2" alt="Signature" /></td>
</tr>
<tr>
<td><img src="image3" alt="Signature" /></td>
<td><img src="image4" alt="Signature" /></td>
</tr>
</tbody>
</table>
Cure

- Standard options are good...
  - In person (office)
  - In person (polls)
  - Mail
  - Fax
- Additional options can be helpful...
  - Email
  - Text
Touch here - http://2vote.mobi/k/DVu5S5 to cure your ballot.

2020 PRESIDENTIAL PRIMARY VOTER SIGNATURE AFFIDAVIT

Version in Español

Please follow these steps to complete a Signature Affidavit by March 11th, 2020.

Call Denver County Elections at 720-913-8683 with any questions.

Enter your PIN Number

SUBMIT
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](https://www.democracy.works/ballot-scout)

**ElectionMail.org**
Report postal system issues directly
[https://electionmail.org/](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](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/](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](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
● 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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