

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!







Tammy Patrick Democracy Fund



Maggie Ollove

Center for Civic Design

maggie@civicdesign.org



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



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 100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0% 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012 2014 2016 2018 ---Election Day --Mail/absentee --Early, in person

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

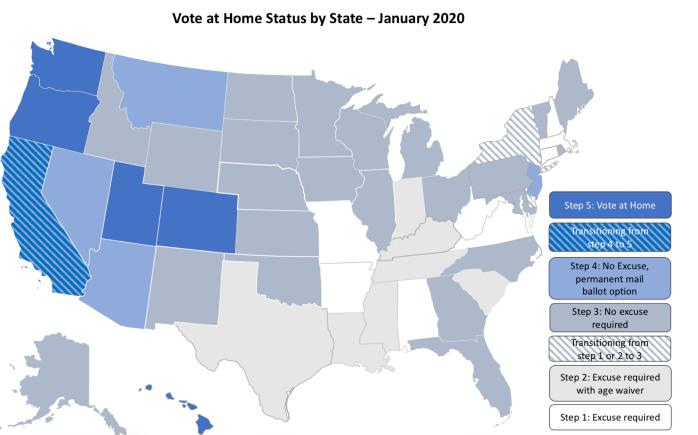
ND has 30 counties using 100% mailed-out ballot voting

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 Package arrived at an Amazon facility 10:34 AM 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

ովվերիիկերիներիներիներիներիներիներիներիներին

USPS round trip tracking

Barcodes make it happen

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

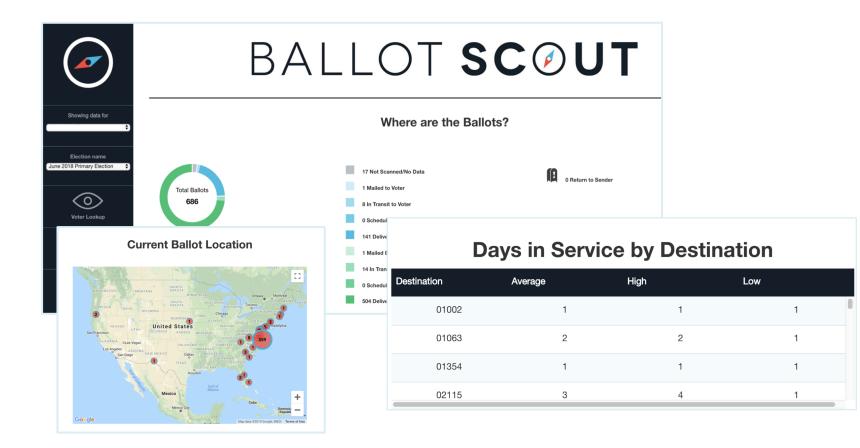
USPS round trip tracking Barcodes and election envelopes

Outgoing envelope Return envelope Franklin County Elections Franklin County Elections Department 4321 Franklin Ávenue 4321 Franklin Ávenue COUNTY Franklin, CA 99999-1234 COUNTY Franklin, CA 99999-1234 SEAL SEAL RETURN SERVICE REQUESTED Official ballot return envelope Vote by mail To be opened only by Canvassing Board. Official ballot FLECTION M մակիրովաի կիրի հեղեկորով ակիրըություն Valentina Voter _ _ _ _ 5678 MLK Avenue Valentina Voter RUSINESS REPLY INSIGNIA Franklin, CA 99999-1234 5678 MLK Avenue Franklin, CA 99999-1234 Franklin County Elections Department Print your name 4321 Franklin Avenue Franklin, CA 99999-1234 Address City State Zip անիրորինինինինինինինինինինինինին If you are unable to sign, make your mark and have a witness sign belo Witness, sign here

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

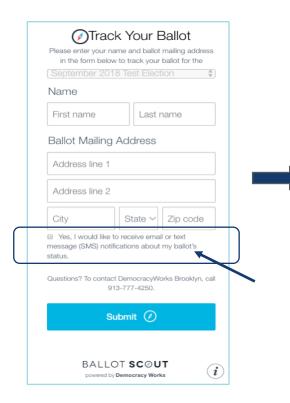
Administrator's Dashboard

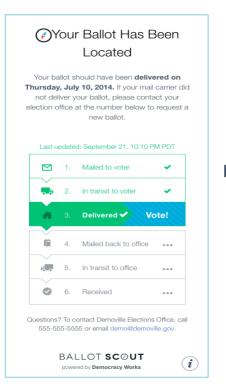
Date Created	Voter Name	Voter Address	Current Ballot Status	Last Scan Received	Outbound Delivery Date	Inbound Delivery Date
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214 3840	Not yet mailed			
	Jessenia6 Eliza6	2110 SE Main StPortland, OR 97214 3840	Mailed to voter	2018-10-04 18:00 CST Lawrence, 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





Hi Gordon! Your ballot has been mailed and is on its way to you it was last scanned in Lawrence, KS at 5:00 PM on August 29, 2018. We'll update you as your ballot travels. Questions? To contact your local election office, call <u>316-123-1234</u>.

7 min

Text message

SMS

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.

Email *			Phone *		
Address *					
	State		~		
Please include your 5-diait	t zin code so that your	issue can be routed to	the annror	riate Election Mail Specialis	et
		issue can be routed to	the approp	priate Election Mail Specialis	st.
Please include your 5-digit Election Jurisdiction * Please include county/pari	•				st.
Election Jurisdiction *	ish/city/town/township/n	nunicipality/village/boi			st.
Election Jurisdiction *	ish/city/town/township/n does this issue imp	nunicipality/village/boi			st.
Election Jurisdiction * Please include county/pari What type of delivery of	ish/city/town/township/n does this issue imp e election official to th	nunicipality/village/boi act?: * he voter			st.

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?: *

O 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

ELECTIONMAIL.OR	G Election Mail Is	sue Reporting		
Notification Email				
	Issue Da	ta and Resolution Entry		
Political / Election Mail <blueshare_sharepoint@usps.gov></blueshare_sharepoint@usps.gov>	Name	Marcala Arbelaez		
Dectormal.org law Reported	Email	Arbeiseptiowitigmail.com		
	Phone	(941) 524-1333		
	Address	4242 Riverwalk Lane 2, Jupiter, Parida 20458		
A new Dection Mail issue has been reported for your respective area of responsibility through Dectionnal org	Election Jurisdiction	Palm Beach County		
	Sent or Returned Hail	Both sent and returned mail		
Person fick mill to review and resolved the losse.	Dementic or UOCAVA Hail	Domestic mail		
	Evolution Type	Initial Request		
🕼 jan man akad a Marak (Santara Mala	Election Cycle(a)	November 2016		
	Date Problem Occurred	3036-09-03		
	Problem Still Occurring	Tes		
	Hail Type	Sallots and Voter Information Hallings		
	Hall Class	rint Gass		
	Hail Vorder	USP5		
	Issue Description	I am requesting an absertise ballst.		
	Number of Affected Voters	Less than 10		
	Patterns/Similarities with Issue	No		
	USPS Contacted	No		
	Additional Comments	None		
	Resolution Notes			
	Issue Resolved	No. W		
	Organization of 9124(2014) 12-25 PM by Canadida Last modified at 9124(2014) 12-25 PM by Canadi	Ide-Tange, R. Tange Court		
UNITED STATES POSTAL SERVICE®		3		

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.co m/govservices/election-mail/



USPS Election Mail Page

(1 of 3)	⊳ ⊡ ×
CENTRAL ILLINOIS	
District Name	CENTRAL ILLINOIS
District ID	604
Area Name	GREAT LAKES
Area ID	4]
State	IL
ZIP3s Served	601, 603, 604, 605, 613, 614, 615, 616
District Lead Name	Cathy Meeks
District Lead Phone	(708) 563-7772



- 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 Algarfith.	Jamo Alganfied
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

∎I AT&T LTE	12:14 PM	ğ 💼 '
<	9	
	Text Message Wed, Feb 12, 3:20 PM	DENVER
	re - <u>http://</u> <u>bi/k/DVuS5</u> to cure ot.	
	Text Message	

◄ Messages LTE 12:15 PM	ğ 🔳 (
AA 🔒 evote2.2vote.mob	i Č	
2020 PRESIDENTIAL PR VOTER SIGNATURE AFF <u>Version in Españo</u> Please follow these steps to	IDAVIT	
Signature Affidavit by March 11th, 2020. Call Denver County Elections at <u>720-913-8683</u> with any questions.		
Enter your PIN Numb	ber	
SUBMIT		



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.

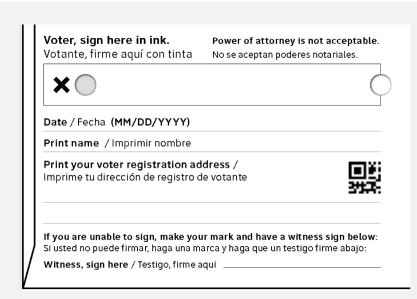
- 1. Ask voters to try your material
- 2. Watch and listen to learn what's working well and what's not
- 3. Use insights to make improvements to your design
- 4. Then, test again!



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/104designing-vote-at-home-envelopes/



A collection of guidelines and templates to help you check the usability of election materials



Usability testing is a way to learn how easy or difficult it is for people to use something by observing them actually using it.

The resources provided in this kit can help you systematize the process, produce reliable findings, and generally expand your ability to test voting materials thoroughly with real users — before you launch them out into the world.

Usability testing toolkit

Tools for getting feedback from voters, poll workers, and other users <u>https://electiontools.org/tool/usabil</u> <u>ity-testing-kit/</u>

Civic icons and images

Civic icons/images

Visual resources for election materials <u>electiontools.org/tool/civic-icons-</u> <u>and-images/</u>



Field guides

Design guidelines, based on solid research and best practices https://civicdesign.org/fieldguides/

Resources

<section-header><section-header><section-header>

Ballot Scout

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

ElectionMail.org

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

USPS District Lead

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



Tag 191s

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

John Adams.

Signature Guidelines

State verification guidelines from Colorado https://www.sos.state.co.us/pubs/electi ons/docs/SignatureVerificationGuide.p df



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?



Center for Technology & Civic Life Center for Civic Design Vote at Home Institute