Managing mail ballot request forms

COVID-19 and Election Administration: Approaches for Election Officials
June 11, 2020
Housekeeping

- Be gracious about **work-from-home setups**
- **Restart Zoom** if needed
- **Slides and captioned recordings** will be available on the registration page
- Use the **chat panel** to say hello, chat with other attendees, and ask questions
Today’s objectives

- Apply best practices to plan for and respond to increased volume
- Adapt simplified templates for your office’s forms
- Consider creative approaches for distributing and receiving mail ballot requests
Today’s agenda

● Introduction (5 min)
● Considering workload (10 min)
● Insights from behavioral science (10 min)
● Design best practices (10 min)
● Creative approaches and useful resources (5 min)
● Discussion (15 min)
● Wrapping up (5 min)
Hello, there!

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Harnessing the promise of technology to modernize the American voting experience

@helloCTCL
techandciviclife.org
Using behavioral science to improve tens of millions of lives around the world.

@ideas42
ideas42.org
Center for Civic Design

Making every interaction between government and citizens easy, effective, and pleasant.

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Federal resources

- Set of documents provide guidance for state, local, tribal, and territorial election officials

- Written by the Joint COVID-19 Working Group
  - Cyber Infrastructure Security Agency (CISA)
  - Elections Infrastructure Government Coordinating Council (GCC)
  - Elections Infrastructure Sector Coordinating Council (SCC)

https://www.cisa.gov/protect2020
Keep in mind

1. This is tough!
2. One size doesn’t fit all
3. Things will change
4. Preparation and flexibility > certainty
5. A supportive team > a solo mission
6. Your work *matters*, and it’s hugely appreciated
Will improving mail ballot request forms be worth it?

CONSIDERING WORKLOAD
Vote at Home Status by State – May 2020
(does not reflect what appears to be temporary COVID-19 policy)

Step 5: Vote at Home
Step 4: No Excuse, permanent mail ballot option
Step 3: No excuse required
Step 2: Excuse required with age waiver
Step 1: Excuse required
In the news

2020 South Dakota primary: Absentee voting up nearly five times from 2016, officials say

Pennsylvania primary turnout high; 1.8M vote by mail

Iowa sets new primary election turnout record after mail-in ballots surge
Impact of increased mail ballot requests: one example

- 30,000 registered voters in the county
- 9,500-14,000 ballot requests
- 45 requests/hr/person processed
- Standard timeline

ElectionResourcePlans.org
Voter outreach

Voter registration processing

Request processing

Ballot preparation

Return ballot handling

Ballot counting

... ElectionResourcePlans.org
Request processing

1.5 - 2.0 full time staff for the three weeks leading up to Election Day for jurisdictions with 30,000 registered voters.

ElectionResourcePlans.org
Flattening the (request) curve

Adapted from the CDC / The Economist by the New York Times.
Facilitating voter comprehension, choice, and action

INSIGHTS FROM BEHAVIORAL SCIENCE
Three challenges, all made more difficult by the pandemic

Capturing attention
Will the message get through to voters in the first place?

Delivering information
Do voters understand and feel confident about their choices?

Facilitating action
Is it easy for voters to immediately act on a request?
Capturing attention

Ensure your message breaks through the scarcity of time, energy, and attention
Make it official

Ensure your message breaks through the scarcity of time, energy, and attention

Send official-looking communications that prominently feature official seals and the USPS election mail logo
Catch the eye

Ensure your message breaks through the **scarcity** of time, energy, and attention

- Send official-looking communications that prominently feature official seals and the USPS election mail logo
- Use elements like registered or first-class mail and high-contrast “teaser” messages on envelope exteriors
Personalize things

Ensure your message breaks through the **scarcity** of time, energy, and attention

- Send official-looking communications that prominently feature official seals and the USPS election mail logo
- Use elements like registered or first-class mail and high-contrast “teaser” messages on envelope exteriors
- Make communications personal by sending them from an individual voters recognize (not an institution)
Delivering information

Equip voters to resolve ambiguity about how to participate in elections
Keep it simple

Equip voters to resolve **ambiguity** about how to participate in elections

Write using plain language in the active voice, omitting any technical jargon or acronyms
Break it down

Equip voters to resolve **ambiguity** about how to participate in elections

- Write using plain language in the active voice, omitting any technical jargon or acronyms
- Break complex processes down into simple checklists with concrete, discrete, and actionable steps
Go on offense

Equip voters to resolve **ambiguity** about how to participate in elections

- Write using plain language in the active voice, omitting any technical jargon or acronyms
- Break complex processes down into simple checklists with concrete, discrete, and actionable steps
- Address potential concerns, myths, or misinformation affirmatively, **without** restating underlying falsehoods
Facilitating action

Help voters overcome *hassles* to follow through on their intentions
Streamline the process

Help voters overcome **hassles** to follow through on their intentions

Integrate, automate, or eliminate steps that voters need to take whenever possible.
Remove small frictions

Help voters overcome **hassles** to follow through on their intentions

- Integrate, automate, or eliminate steps that voters need to take whenever possible

- Include **short** links for online forms and prepaid return postage for paper forms to remove barriers to action
Timing is everything

Help voters overcome **hassles** to follow through on their intentions

- Integrate, automate, or eliminate steps that voters need to take whenever possible
- Include *short* links for online forms and prepaid return postage for paper to remove micro-barriers to action
- Send communications and reminders when voters can act on them, or as close to when they can act as possible
Approaches for upgrading mail ballot request forms

DESIGN BEST PRACTICES
Make it an invitation

Use the space on the envelope as part of the message

Make it official with a seal and Election mail logo
An invitation...to make a request
Use it to help voters understand the process
## Think about the messages

<table>
<thead>
<tr>
<th>Address side</th>
<th>Message side</th>
</tr>
</thead>
</table>
| **Be ready to vote in the June 23 Primary Election**  
Request your absentee ballot by June XX | **You can vote safely in the June 23 Election**  
All voters can vote with an absentee ballot…no excuse needed. |
| **Vote safely in the June 23 Primary Election**  
Request your absentee ballot by June XX | **Get your absentee ballot and vote from your kitchen table**  
For the June 23 Primary Election, all voters can use an absentee ballot. No excuse needed and signing up just takes minutes. |
| **Vote from home in the June 23 Primary Election**  
Request your absentee ballot by June XX | **You can help make this a safe election for everyone.**  
For the June 23 Primary Election, all voters can use an absentee ballot. No excuse needed and signing up just takes minutes. |

- Coordinate the message on the front and back of a card.
- Don’t just say it’s easy…make it easy
Add it to other mailings

A ballot request sent with a voter guide

- Invitation to vote by mail
- Prefilled address
- Option to change check if correct
- Permanent vote by mail list
- Voter's signature

Shasta County, CA
Make it easy

Do as much work for voters as possible (and make it easy to process the form, too).

Options to use the online or paper form

Provide their details and make form easy to process

Keep the rest of the form as simple as possible:
- Check
- Correct
- Sign
- Send
Make it part of registration updates

Ask voters to check their address and party at the same time

Voters sign in to the portal

Help people who aren’t already registered

Confirm address

Update or Request a ballot

https://www.elections.virginia.gov/casting-a-ballot/absentee-voting/
Include any COVID instructions

Help voters get it right

If you wish to avoid going to the polls on election day due to COVID-19, choose the first option. The second option required medical approval and a mailed application.
Have an online form just for ballots

https://escambiavotes.com/vote-by-mail
Make a fillable form to print

Can this form serve as a voter registration form?

What are the options for returning the form? Must it be printed and mailed?

Do you need a ‘wet’ signature?
What about:
- Driver’s license
- E-signature
- Signature image

Inspiration: Pennsylvania
Tell voters what they need

Let them know before they start if they need:

- A driver’s license or state ID number
- Social security number
- A witness signature
- Notary

Or if any absentee voting requirements have been waived for ballot requests due to COVID
Resources

A tool kit of resources for scaling up vote by mail
https://civicdesign.org/tool-kit-for-scaling-up-vbm/

State-by-state summary from NCSL Voting Outside the Polling Place: Requesting an Absentee Ballot and Table 6
A quick rundown

CREATIVE APPROACHES AND USEFUL RESOURCES
Creative approaches for distributing request forms

- Grocery stores (OH)
- Food pantries (OH, PA, MD)
- Newspapers (ME, OH)
- Take out deliveries (FL)
- Voter maintenance plan mailings (Chicago)
- Existing municipal elections
- Other local government mailings and newsletters
Timeline: 4-5 months to Election Day

- Pursue community partnerships
- Review printing vendor contracts
- Redesign forms, envelopes, and online options
Let’s talk
DISCUSSION
Share your thoughts

- Any “aha!” moments? Any concerns?
- What questions do you have about what we covered today?
- What questions do you have about what we *didn’t* cover today?
A few final updates

WRAPPING UP
As more questions come up...

- Check in with CCD (hello@civicdesign.org)
- Send a note to ideas42 (tom@ideas42.org)
- Reach out to CTCL (hello@techandciviclife.org)
  - We’ll help out, or
  - We’ll try to find someone for you who can
What was your experience with today’s course?

- Quick poll
- 3 minute survey
- Please complete now to provide feedback and improve the webinar for future participants
See you soon!

- Supporting election officials (Thursday, May 21)
- Planning 2020 workload and resource allocation (Tuesday, May 26)
- Ensuring access, equity, and inclusion (Thursday, May 28)
- Educating voters about their options (Thursday, June 4)
- Maintaining voter lists (Tuesday, June 9)
- Managing mail ballot request forms (Thursday, June 11)
- Organizing ballot drop-off locations (Tuesday, June 16)
- Streamlining the inbound ballot process (Thursday, June 18)
- Verifying and curing signatures (Tuesday, June 23)
- Recruiting and training election workers (Thursday, June 25)
- Implementing public health guidelines for voting locations (Tuesday, June 30)

[techandciviclife.org/covid-19-webinars/](techandciviclife.org/covid-19-webinars/)
Thanks!

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