



Designing Your Election Worker Training Program

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- It is important to create a comprehensive and effective training program that covers all the relevant topics your county performs and gives the election workers the skills they need to carry out their duties successfully.
- Designing an effective election worker training program requires careful consideration and planning.
- This can be designed to be both online and in person.



REMEMBER: (TEC 32.114) – Public County Training Program – requires the county to provide training to election workers.



- Adapting to Learning Styles
- Training Development
- Creating Instructional Material
- Tools to Improve Your Training Program



Adapting to Learning Styles





What are 4 different types of adult learning styles?

Reading (manuals, visual aids, workbooks);

Listening (lectures, interactive question-and-answer sessions, slide presentations);

Visual (typical polling place scenarios, Election Day simulation videos, or YouTube videos);

Kinesthetic (hands-on, real world, action scenarios).



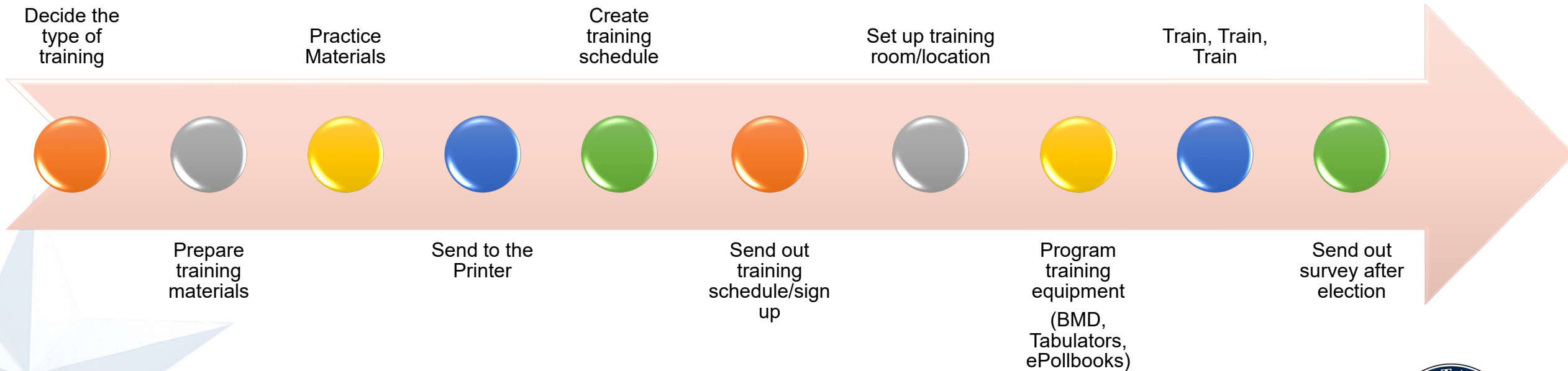


- Remember to constantly adapt your training methods to accommodate the different adult learning needs.
- Be up to date with changes in law or technology, to achieve a more engaged, knowledgeable and confident pool of workers serving your elections.



Training Development







What type(s) of training do you currently perform in your office?



Online?

In Person?

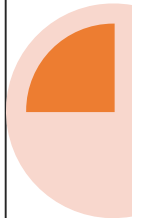
Both Worlds?





Online Virtual Training

In Person Training



Advantages

- Flexibility of more attendees
- Comfort of their home
- Impromptu for workers that can't attend in person
- Cost-effective – manuals, references
- Health concerns



Disadvantages

- No hands-on experience
- You don't know how much information is retained
- Lack of face-to-face interaction/feedback
- Difficulty staying motivated
- Not able to complete required paperwork
- Limited access to resources and support
- Technical difficulties
- Isolation
- Miss networking with other election workers



Advantages

- Smaller classes allow for comfort in participation
- Hands-on
- You see how much they retain the information
- Face-to-face interaction/feedback
- Ability to motivate them
- Complete required paperwork
- Access to resources and support
- Networking with other poll workers
- Ability to gauge level of expertise



Disadvantages

- Limited on the number of attendees
- Not cost-effective
- Limited amount of classes held
- Can't watch recorded training
- Health concerns at the time of training

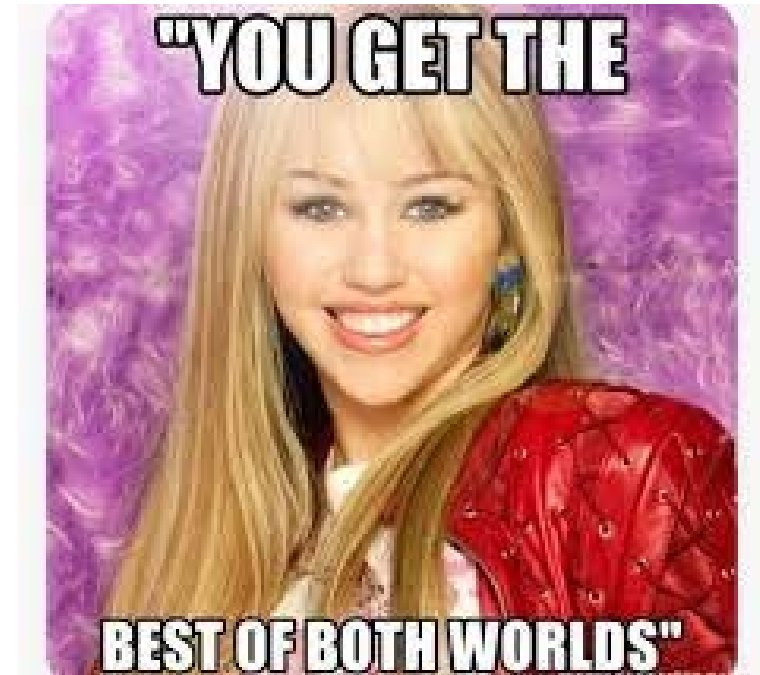




In Person + Online
Training

Multiple
Options

You get the best
of both worlds!





How much time should you allow yourself to present a well rounded training?

Stand up if your county trains election workers.

Sit down when we call your total hours your county trains election workers.





2 to 3 Hours

- New Changes & Important Updates
- Setup/Operation/Shutdown of Equipment
- Opening & Closing the Polling Place
- ADA Compliance
- Chain of Custody
- Verifying Seals and Resealing Seals
- Importance of Completing Paperwork
- How to Spoil & Reissue Ballots
- How to Process Voters – ID's/Basic Scenarios of Perfect, Suspense, Address Change, Not on Roster, On Roster but shows voted, Ballot by Mail: Mailed Ballot, Received Ballot & Cancelling ABBM, Provisional Process
- General Rundown of Curbside Procedures
- Showing how to do Basic Troubleshooting
- Awareness at the Polling Place
- Pickup/Dropoff Review of Expectations
- Provide and Review Point of Contacts
- Basic Review for Emergency Procedures
- Balancing Basic Figures for Reconciliation
- Polling Place Courtesy
- Poll Watchers





4 to 4 ½ Hours

Allows time for Hands-on Equipment
Role Play with Scenarios with voter being hands-on with ePollbook
Detailed Hands-on Breakdown of Provisional Process
Explanation of Limited Ballot
Organization at the Polling Place
More Detailed Expectation of Pickup & Dropoff
Implementation of Short Videos
Hands-on Troubleshooting

6 Hours +

Processing Paperwork in Detail – Hands-on
Customer Service & De-escalation Procedures
Emergency Procedures in detail
Q&A Time
Plus many More!





- Consider the amount of people in each class
 - How big is your classroom?
- Provide multiple classes to fit everyone's needs
 - Have different start times to accommodate workers that cannot come in from 8-5
- Make sure your training room is ADA accessible and can accommodate free movement in the class environment.
- Web Pages: remember to provide links to study before class
- Provide the following at your training:
 - Notepads and pens to encourage note taking.
 - Handouts to take home for review.





- **How would you handle Hands-on Training?**
 - Create simulation stations on the polling place
 - Divide workers into small groups
 - Rotate participants to stations
- **What type of Stations can you create?**
 - Qualifying Voters
 - ePollbook
 - Voting equipment
 - Processing Paperwork





- Real-world election scenarios
- Helps workers gain confidence in a safe setting
- Increases learning and retention
- Provides hands on experience
- Enables better teamwork and communication
- Increases problem solving skills
- What types of role play can you incorporate?
 - Voter Scenarios with ePollbook/OLRV,
 - Electioneering,
 - Irate Voter,
 - Poll Watcher Interaction &
 - Terminology

How could you incorporate Role Play when people don't want to participate?

Find 2 people that will role play with you and have them assist you in your trainings to allow the others to learn.





Creating Instructional Material





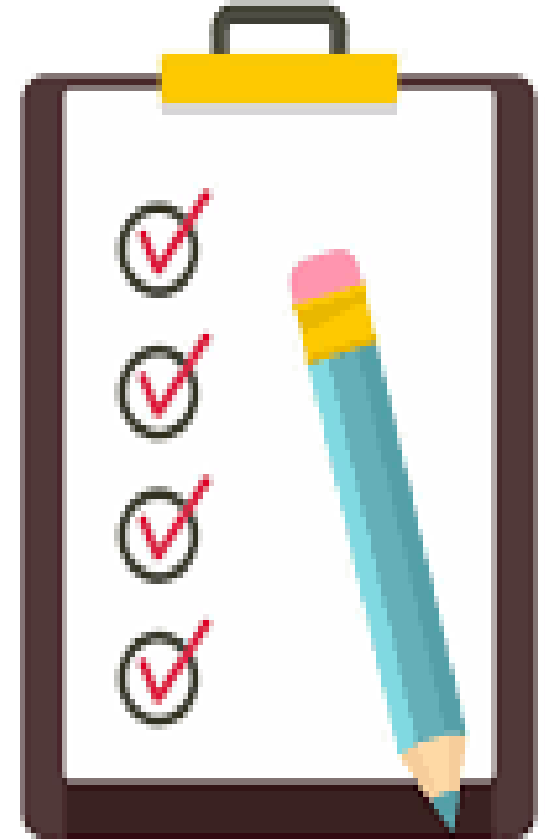
What Resources can I use to help make my checklist?

- Opening and Closing the Polls Checklists
- Judges and Clerks Handbook
- SOS Online Poll Worker Training
- Phone a Friend
- Surf the Web
 - County Websites
 - Secretary of State Website
 - votetexas.gov
 - Election Assistance Commission Website
- Vendor Materials
 - ePollbook
 - Voting System
 - Training Videos





- PowerPoints
- Manuals
- One Page for a Quick Guide
- Include a checklist of duties for each work station to be performed at the polling place
- Develop specialized training for vote centers and early voting sites.





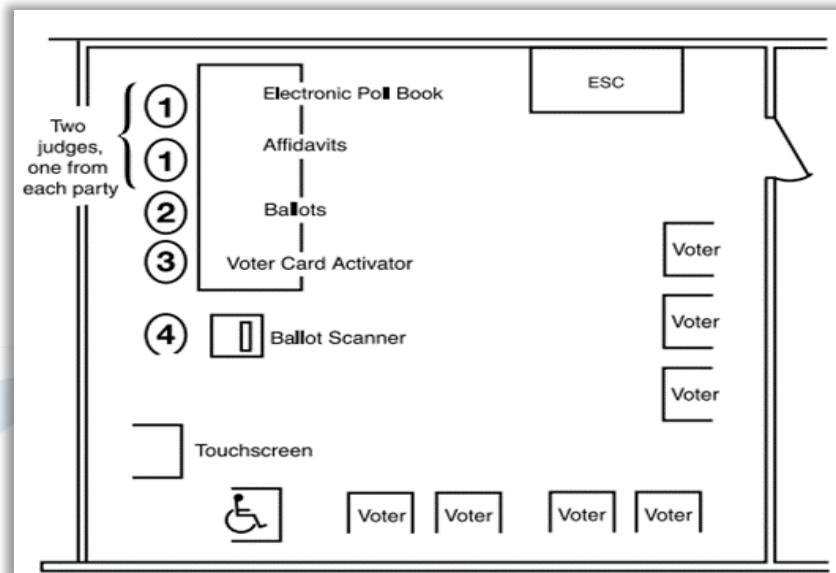
- When developing materials, election workers should know the difference between Early Voting and Election Day.
- Different instructions/procedures for Opening and Closing Equipment
- Different Procedures for Ballot Stock
- Limited Ballots for Early Voting
- Postings are different
- Consider developing separate Early Voting and Election Day Manuals





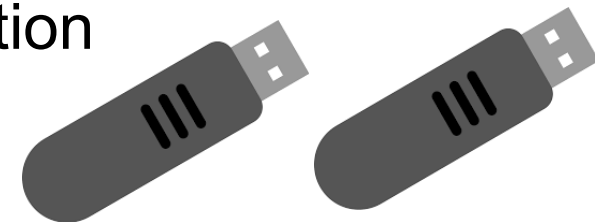
Include Pictures and Diagrams

- **Polling Place Diagram:** Provide a Visual Layout to prevent fleeing voters.
- **Voting Equipment and Storage:** Provide a Visual Picture of how to properly store.





- Consider providing targeted training for new workers, high school and college students, troubleshooters, and polling place officials, and internal staff.
- Color Code Manuals, Equipment, & Paperwork
- Provide videos on flash drives with training information for those who don't have internet access





- Create online videos available for all training topics by creating short YouTube videos to allow workers to choose the areas where they need additional review. Some examples are:
 - Equipment operations
 - Location of supplies
 - Voter Interaction
 - Opening and Closing procedures
- Create an election library on your website and include training brochures, manuals, reports, and checklists, and links to your YouTube training videos.





Design instructional materials that are easily used in the polling place.

- Make sure they are easy to read and understand quickly.
- Make it clear where one step ends and the next begins.
- Use legible fonts (sans serif for accessibility). Be consistent in the font used.
- Put enough space between lines
- Use bold to highlight important information (but don't overdo it).





What type of Subjects Should you Consider Developing?

- Critical Subject Areas
- New Procedures
- Election Equipment
- Paperwork
- Early Voting Procedures
- Election Day Procedures
- Polling place accessibility
- Curbside Procedures
- Plus many more!

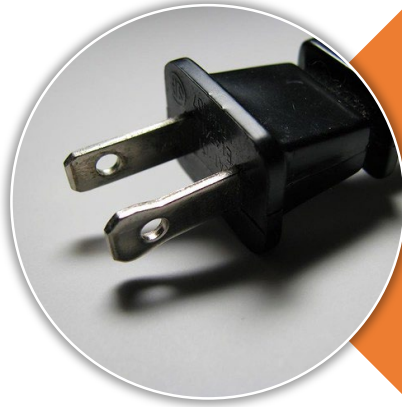
DISCLAIMER





- When writing instruction, avoid writing a narrative paragraph and put in sequential order.
- Be direct and to the point
- Put warnings before instruction and not after consequences
- Remember to use graphics to illustrate actions





Note: There are two plugs that you will be working with. These two plugs are color-coded so that you can plug them into the voting equipment correctly and into the proper place that plugs into the wall.



The plugs with the red and yellow dots are plugged into the power supply to help you determine where to insert the dots on the power supply to help you match the dots on the plugs so nothing blows up.



Biography!
Bad Example





**Good Example
Use Me!**



Insert the plug with the red dot into the surge protector outlet with the red dot.



Insert the plug with the yellow dot into the surge protector outlet with the yellow dot.





Put warnings before — not after consequences.

Be sure instructions can be followed in order, putting warnings or preparation needed before the action.

Bad Example

The battery can explode if it is replaced by an incorrect type. The Lithium-Ion Battery Pack can be replaced only by Authorized Service Personnel.





Put warnings before — not after consequences.

Be sure instructions can be followed in order, putting warnings or preparation needed before the action.

Good Example



Caution! Risk of explosion!

The battery can explode if it is replaced by an incorrect type. The Lithium-Ion Battery Pack can be replaced only by Authorized Service Personnel.





Review your Content prior to Training:

- Review your documentation often by following the procedures, yourself.
- Provide your content to an experienced election worker for review.
- Remember to take notes as you go when making corrections to instructions or mistakes.
- Use what you learn to revise the documentation.
- Test throughout the development cycle, starting at the beginning, not just at the end.





Food for Thought:

- Do you have a backup for last minute trainings?
- Are you trying to recruit workers and don't have enough time to arrange last minute trainings?
- How are you providing and reviewing material?
- Covering all of the main points that need to be addressed.

What if:

Seven horizontal grey rounded rectangular boxes stacked vertically, intended for handwritten notes.





Tools to Improve Your Training Program





Evaluate your workers throughout their training and track their performance to determine who needs help first election morning. Classify as a Priority 1, 2 or 3.

Priority 1:

- Someone must be there to ensure that the polls are open on time.

Priority 2:

- After priority 1's have been handled, then proceed to priority 2 locations to make sure they have not encountered any issues and ensure the polls are opened on time.

Priority 3:

- Once priority 2's have been completed, then make your way to priority 3 locations to visit. It is usually just a check in and see how things are going.

Note:

- If you don't make a notation for the poll worker, then they should be fine all day.





Benefits





Example Survey Question Options:

- . Did you find the instructors knowledgeable about the content?
- . Was the length of the training appropriate for the content presented?
- . Is there anything you would like to see implemented in the next training?
- . Was the content explained in enough detail?
- . Which aspects of the training did you find the most beneficial?
- . Which aspects of the presentation could be improved?
- . Overall, were you satisfied with the training?
- . Did you feel prepared to work after the training you received?



How many questions should you ask?
No more than 10





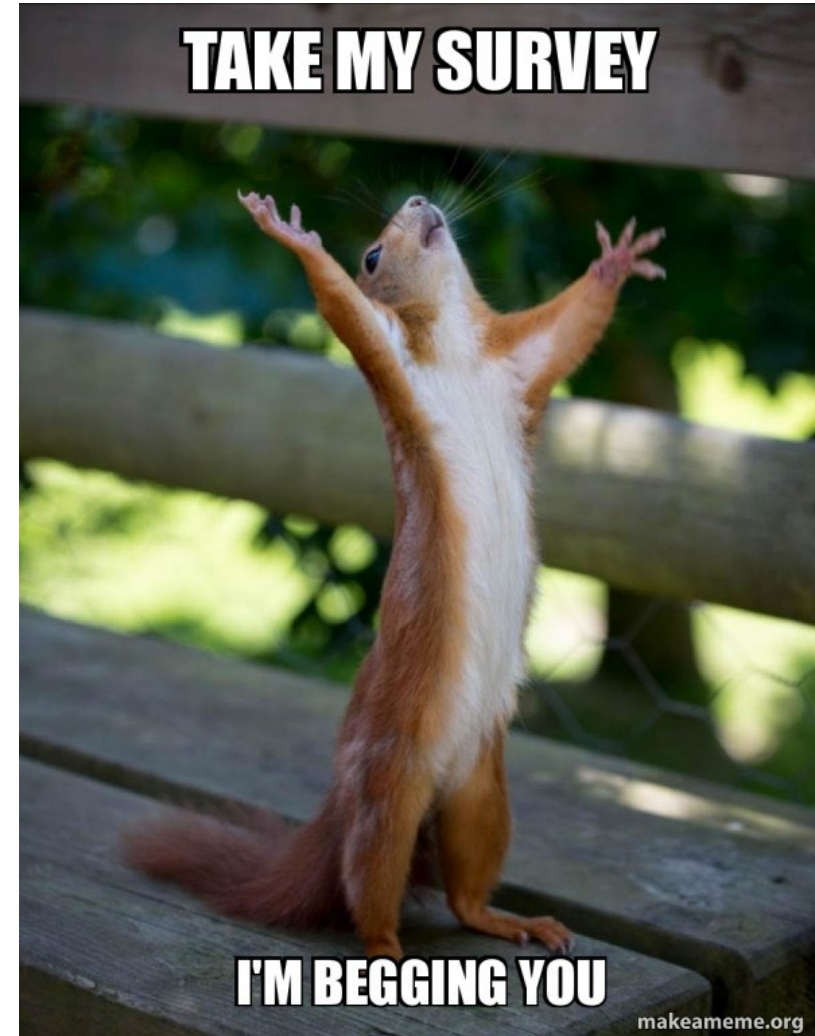
Ways to send a survey out?

- Online
- Paper Form

When should you send a survey out?

- After training
- After election
- End of year
- Every 2 years

Whenever you want!





- **Update when necessary:**
 - Legislative Updates
 - Voting System Changes
 - Court Orders
 - Refreshing the content and...
- **Importance of Updates:**
 - Most up to date material
 - Legal Compliance
 - Continuous Improvement

NEW UPDATE





Carefully developing your Training Program will result in:

- Poll workers will be successful in their roles and more confident when performing their job duties!
- Sets you up for success and allows you to cross the finish line with ease.
- Enables you to continue your adventure for future elections to come!





Things that we have seen at Counties we have Visited:

- Last Minute Trainings – Support at Supply Pick-Up
- Pairing up experienced workers vs. inexperienced workers
- Utilizing other county materials
- Vendors on hand to help with training on equipment
- Not limiting people in an in person class causing congestion when doing hands on training
- Not providing enough hands on time with equipment which caused confusion
- Breaking training in different classrooms and rotating throughout the training
- Combined Early Voting and Election Day Manuals
- Multiple trainers training with same information and providing different answers to procedures



**There are no secrets to
success. It is the result of
preparation, hard work, and
learning from failure.**

COLIN POWELL

EVERYDAYPOWER





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thank you!

