

Inadequate Poll Worker Training ... Again

Summary

During the June 2016 Primary Election (Primary) a number of problems were experienced by poll workers at many precincts throughout Nevada County. In a complaint received after the Primary, the Nevada County Grand Jury (Jury) was informed that the Electronic Poll Books (ePB) did not function correctly at most locations, causing delays for the voters. (The ePB is an electronic tablet used to verify a voter's registration information.)

The complaint also stated poll workers were ill prepared because of a lack of adequate training on the equipment and the voting process overall. This lack of training was experienced at all levels of participating workers. Previous Jury reports, in 2012 and 2014, also revealed that the lack of in-depth training is an ongoing problem. The Jury wanted to verify that the Registrar of Voters (Registrar) had complied with the commitments made in response to those reports.

The ePB problems were addressed prior to the November 2016 General Election and they performed better. However, the lack of quality training once again became an issue. All poll workers were expected to attend a four-hour training session to prepare them for the election. However, the training was found to be seriously deficient. Poll workers questioned by the Jury during and after the training stated that they did not feel adequately prepared. During the election, this lack of training was evident with many workers unsure of how to set up or operate the equipment.

The Registrar should make a serious effort to have a meaningful training program developed and given by training professionals. Reading aloud from the *Poll Worker Reference Guide* (Guide) does not constitute actual training. A newly defined program needs to be established to

- provide quality training specific to the role of the poll worker,
- reduce class size to increase the number of sessions and allow more individual hands-on training, and
- enable mock setup and breakdown of a precinct to give all trainees the hands-on experience recommended by California's *2016 Poll Worker Training Standards*.

Changes in the California election process in 2018 will require that future training sessions for poll workers be greatly enhanced. In August 2016 the VoteCal Voter Registration Database Project (VoteCal) project was deployed to develop and implement a statewide uniform, centralized, interactive, and computerized voter registration database. Nevada County's participation in VoteCal will require a secure Internet connection from each ePB to either VoteCal directly or a database at the County Registrar of Voter's office. Poll workers must be trained to understand the process and to securely interact with this connection.

The passage of the *California Voter's Choice Act (SB450)* in September 2016 will also have an impact on poll worker training. SB450 changes the voting process as described below:

- Every registered voter will receive a ballot in the mail 28 days before the election.
- Registered voters may return their ballots by mail, at “drop-off” locations, or at five or more “vote centers” set up throughout the County.
- Voters may also go to a vote center to cast their ballots or even register to vote and immediately cast a conditional ballot.

Because there will be fewer vote centers than the current number of precincts, fewer poll workers will be needed. They will, however, have to be more expert in the operation of the vote centers and their equipment. The operation of vote centers will be more complex and they will be in operation for a longer period, some for as many as ten days before the election.

Poll worker training will be even more important in the next election. Although the General Election in November 2016 was successful it was not without its problems. The addition of new technology and the requirements of recent legislation will increase the impact of poor training. The Jury recommends that the Registrar evaluate and improve the poll worker training program.

Glossary

County	Nevada County
ePB	Electronic Poll Book
eScan	Electronic scanner
eSlate	Electronic voting device
Guide	Poll Worker Reference Guide
Jury	Nevada County Grand Jury
Primary	June 2016 Primary Election
Registrar	Nevada County Registrar of Voters
SB450	California's Voter's Choice Act, Senate Bill 450
Training Standards	Poll Worker Training Standards
VoteCal	VoteCal Voter Registration Database Project

Background

The Jury received a complaint regarding problems with polling equipment employed during the June 2016 Primary Election and with poll worker training in preparation for that election. Specifically, the complaint alleged problems with the functioning of the ePBs - electronic tablets containing the names and addresses of all registered voters that were used to check in voters at all polling places. Some voter information was missing from some or all of the ePBs.

On the issue of training, the complainant alleged that training on the operation of the ePBs and other voting equipment was poor and did not prepare the poll workers to operate the equipment

properly. The complainant asserted that the main focus of the training session was a verbal presentation and that little time was devoted to hands-on instruction with the equipment in a real-time setting.

The inadequacy of poll worker training in the County has been an issue raised in at least two Jury reports in the recent past. Both found deficiencies in the training of poll workers and, specifically, in the amount of hands-on training provided. In reports by the 2012-2013 and 2014-2015 Juries, poll worker training was found to be inadequate. The training sessions included little hands-on exposure to the devices that are used at the precincts during the election. (See Attachments A and B)

Changes in the California election process in 2018 will require that future training sessions for poll workers be greatly enhanced. In August 2016 the VoteCal project was deployed to develop and implement a statewide uniform, centralized, interactive, and computerized voter registration database. Nevada County's participation in VoteCal will require a secure Internet connection from each ePB to either VoteCal directly or a database at the County Registrar of Voter's office. Poll workers must be trained to understand the process and to securely interact with this connection.

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Because there will be fewer vote centers than the current number of precincts, fewer poll workers will be needed. They will, however, have to be more expert in the operation of the vote center and its equipment. The operation of vote centers will be more complex and they will be in operation for a longer period, some for as many as ten days before the election.

The Jury concluded that an investigation into the problems with the ePBs and the current poll worker training program was necessary.

Approach

The Jury initiated its investigation by interviewing the complainant and several volunteer poll workers who had worked in recent elections. The interviews focused on the training the poll workers had received in the few weeks before the elections.

Following the initial interviews, the Jury looked specifically at the problems that had occurred in the June 2016 Primary Election with the ePBs. The Jury did a hands-on review of the operation

of the ePBs and investigated possible reasons for the malfunctions that had been experienced by poll workers and by the Jury in its review.

The Jury thereafter interviewed County elections personnel regarding the training offered to the poll workers. As the November 2016 General Election neared, Jury members attended a number of training sessions along with poll worker trainees that would be responsible for the setting up, operation, and closing of the precincts within the County. These sessions were held throughout the County in the weeks before the election. In some instances there were as many as 40 trainees in attendance.

At the end of the summer, the Jury attended a presentation by the ePB vendor and employees of the Registrar's office that was intended to show that the problems with the ePBs had been corrected.

Jury members then visited polling places during the election and observed poll workers during the voting process at several precincts throughout the County. The Jury members observed the opening, voter processing, and closing of several precincts on Election Day. On these visits, the Jury was able to see the types of problems that arose and how such problems were solved.

Jury reports from other counties that discussed poll worker training were also reviewed. The Ventura County Grand Jury, for example, recommended "that the Training Course include additional hands-on training to improve setup and usage of electronic voting machines." The Orange County Grand Jury likewise found "the class sessions did not allow enough hands-on experience with the electronic voting machines ...". The poll workers in Santa Cruz County recognized the need, as they "indicated they wanted more 'hands on training' ...".

In addition, the Jury reviewed the Poll Worker Training Standards (Attachment C) (Training Standards) revised by California in 2016 in which the importance of hands-on training is stressed: "Hands-on training will reduce the number of problems on Election Day ... [P]oll workers should have hands-on training on each piece of equipment." (Attachment C, Section 5) The County's training fell far short of these Training Standards.

Finally, the Jury reviewed the Registrar's post-election questionnaires filled out by poll workers from both the June 2016 and November 2016 elections.

Discussion

Electronic Poll Books

The problems reported by the complainant concerning the operation of the ePBs were acknowledged by the Registrar's office even before the June election had ended. The ePBs were supposed to provide listings of all registered voters in the precinct in which they were used. Moreover, they were supposed to have, in a separate searchable file, listings of all registered voters in the County. In theory, a poll worker would ask for a voter's name and/or address. Inputting that information allowed the poll worker to confirm that the voter was registered and

was at the correct precinct. If the voter's name did not appear on the precinct's list, the poll worker could search the entire list of registered voters on the ePB and direct the voter to the correct precinct. If no registration appeared, the poll worker would allow the voter to cast a provisional ballot. Early on Election Day, it was discovered that there were gaps in the data on the ePBs. Names were missing. In other cases, addresses were missing. In short, the data on the ePBs was not an accurate reflection of what appeared in the Registrar's database. Fortunately, each precinct had a paper backup listing of all registered voters. When a name did not appear on the ePB, the poll workers could consult the paper master list. Thus, the missing data created some inconvenience and delays but did not affect the integrity of the voting process.

On hearing of the problem, the Registrar acted quickly, issuing a press release on the afternoon of the day of the election acknowledging the problem and explaining that it could be solved by using the master back-up list. As the Jury began its investigation, the Registrar already had demanded the ePB vendor demonstrate that the problems had been corrected or the ePBs would not be used in the November election.

The Jury's hands-on exposure to ePBs that had been used in the June election confirmed the problems. Several jurors' registration information was missing or difficult to access. Some ePBs simply did not work.

At the presentation by the ePB vendor, it appeared that the vendor had committed significant assets to solving the problems and had been successful. The Registrar decided to employ the ePBs again in the November election and it was apparent that the problems from June had been solved.

Poll Worker Training

The second aspect of the Jury's investigation, poll worker training, was not as easily explained.

All poll workers are provided a 50-page booklet entitled *Poll Worker Reference Guide*. The Guide describes the expectations, duties, processes and rules of being a poll worker. For example, the Guide describes the different types of voter, security seals and how they are to be identified and logged. In addition, the Guide describes the placement of outdoor signage, the posting of the precinct voter manifest, ADA requirements, and the voter check-in process. However, the Guide contains minimal information regarding the various devices to be used at a polling location. The ePB is referred to but there is no information on how to operate it. Nor is it mentioned in the "Appendex [sic] 1: Troubleshooting Equipment" section of the Guide. A separate user guide for the ePBs was developed but the information offered was minimal.

A copy of the Guide was provided to each poll worker at their training session and also was available on the Registrar's website. Poll workers were expected to take the time to read and understand the Guide. In addition, they were required to attend a training session.

The training sessions were scheduled to be four hours long and were held at several locations throughout the County. In the sessions attended by members of the Jury, approximately 80% of the instructional time was devoted to a verbal presentation of the contents of the Guide. In many

instances the trainers, who were experienced poll workers, simply read the Guide to the trainees. The trainers did not appear to have any training experience and, moreover, appeared not to have any lesson plan to follow to ensure that all-important aspects of the training requirements were covered. In some instances, the trainers disagreed with one another and argued about how to interpret subject matter in the Guide.

The remaining 20% of the training sessions involved instruction on how to operate the voting devices the trainees would be using – known as the ePB, eSlate, and eScan. Given the number of trainees attending, only a few were able to actually operate the devices and ask questions. For example, a demonstration of setting up an eSlate was performed by the instructor with no participation by the trainees. Likewise, the actual setting up of a precinct was briefly demonstrated by one of the trainers, again with no hands-on participation by the trainees. In many of the sessions, there were just a few ePBs, eScans, and eSlates available for the 30 to 40 trainees to see or operate. Many of the poll workers stated that they did not have any time at all with the equipment. Trainees questioned during and after the training reported that there was not enough time to allow them to learn how to operate and troubleshoot the equipment.

Thirty percent of poll workers who completed a post-election questionnaire reported that the training was too short. They also would have liked more hands-on time to learn how to operate the polling equipment. A significant number of the inspectors, experienced poll workers who completed the questionnaires, also felt the training fell short on time spent on the equipment.

The Jury found that the poll worker training offered to both new and experienced poll workers was not adequate to train the workers in the functionality of the equipment they were responsible for operating and maintaining on Election Day. Given that not all poll workers are technically skilled, more hands-on training is needed to ensure they can perform their duties on the day of the election.

Changes in the Election Process Requires Changes in Training

An improvement in training is especially important because of fundamental changes in the voting process that will be in place with the next election.

Starting in 2018 with the implementation of VoteCal¹ and SB450 (see Attachment E), all registered voters in the County will receive vote by mail ballots. Such ballots may be returned by mail. In addition, ballot dropoff locations and vote centers will be established throughout the County for completed ballots to be returned. SB450 provides for the number of ballot dropoff locations and vote centers based on the number of registered voters in the County. It also designates the length of time before the day of the election that the ballot dropoff locations and vote centers are required to be open. Vote centers will be open for as much as ten days before the election. The Registrar's Office plans to open seven vote centers.

¹ VoteCal Voter Registration Database Project(see Attachment D), designed to develop and implement the requirements of the federal Help America Vote Act (HAVA) of 2002 (Public Law 107-22, 107th Congress)

At the vote centers, a voter may

- return a vote by mail ballot,
- vote on a provisional or replacement ballot,
- vote electronically,
- register to vote, or
- update a voter registration through the day of the election.

Each vote center also will have at least three voting machines and at least one ePB. The poll workers will be directly responsible for the transfer of all registration and voter data in real-time with the ePB. Each ePB will be electronically linked to the County's election management system.

Well trained, knowledgeable poll workers will be required to be present at all vote centers for the time that the vote centers are open. They must be trained to set up, operate, and close each vote center and to help voters operate the voting machines. This would include the unpacking and setting up of the voting equipment as required at an actual vote center, demonstration of the setting up of each table as required, practicing interaction with the various types of voters with role playing, and performance of the steps required to close the vote center. In short, it is imperative that the training offered to poll workers meet VoteCal requirements. The ePBs will have a much more important role in the 2018 election and training must improve to ensure that poll workers understand their use. The longer hours involved in keeping seven vote centers open for ten days and additional technical expertise required at each vote center creates the need for a more effective training program.

Guidance for the County is available in the Training Standards, designed to "provide elections officials with the information needed to provide training and written materials to their poll workers." The Training Standards state "The most effective training for poll workers comes out of discussion between the trainers and the trainees." To promote discussion, training sessions should include:

- role-playing,
- setting up mock polling places,
- hands-on exercises with voting equipment,
- team exercises, and
- questioning the poll worker trainees.

Hands-on training is stressed throughout the Training Standards and should be implemented by the Registrar to make poll worker training effective.

Findings

- F1** The training did not require demonstrated competence and capability by each poll worker in the use of equipment and the sessions were too large.
- F2** Training material and verbal instructions were incomplete, inconsistent, and contradictory.
- F3** The training did not include demonstrated hands-on competence or the capability of each poll worker to apply proper procedures.
- F4** The Guide does not include any ePB operating instructions or troubleshooting information. A separate simplified user guide covered the ePB in the most general of terms.
- F5** Too much class time was spent reading the Guide aloud and not enough on the setup and operation of the equipment.
- F6** The training was hosted by experienced poll workers but they apparently had no lesson plan to follow.
- F7** An actual mock setup and breakdown of a precinct was not performed by the trainees.
- F8** Many post-election critiques filled out by poll workers indicated they thought the training they received was not adequate.
- F9** The training offered by the Registrar for the June and November 2016 elections did not correct the problems identified and published in the 2012-2013 and the 2014-2015 Jury reports.
- F10** The training offered by the Registrar was disorganized and did not meet the recommendations outlined in the State's 2016 *Poll Worker Training Standards*.
- F11** The Internet connectivity requirements established by VoteCal dictate a more comprehensive and effective training program for poll workers.

Recommendations

The Nevada County Grand Jury recommends the Registrar of Voters implement the following recommendations.

- R1** Training sessions should have fewer trainees to allow them the time to become proficient with all aspects of the process.

- R2** The training sessions would better serve trainees by beginning each session with a mock polling place setup.
- R3** The training for setup and closing of the mock polling place should be organized so that new poll workers do most of the work under the supervision of trainers and more experienced poll workers.
- R4** The Guide should be a reference for the poll worker, not a training aid. Important points should be summarized with slides or other visual aids.
- R5** The Registrar should consider hiring a professional training expert to organize and develop an effective training course including a comprehensive lesson plan.
- R6** Future poll worker training should include the additional requirements that will be in effect for the 2018 election due to changes resulting from VoteCal and SB450.
- R7** Training on the web-connected ePB for the 2018 election should, in particular, be comprehensive.
- R8** The County's poll worker training should meet the recommendations included in the *2016 Poll Worker Training Standards*.

Request for Responses

Pursuant to Penal Code section 933.05, the Nevada County Grand Jury requests responses from the following:

Nevada County Registrar of Voters by July 24, 2017.

Attachment A

Previous Report Findings and Recommendations by the 2012-2013 Nevada County Grand Jury

November 2012 Presidential General Election in Nevada County

Summary

The Nevada County Grand Jury is pleased to report to the citizens of Nevada County that the November 6, 2012 Presidential General Election in Nevada County ran smoothly, problems were minor, and the election was conducted effectively.

Members of the Jury visited most of the 56 precincts in Nevada County on Election Day. During interviews conducted with poll workers it was determined that some precincts had difficulty in setting up the voting equipment, some precincts had voting equipment failures and some precincts were crowded. In most cases poll workers who had difficulty with setting up their voting equipment were able to shut them down and re-start the set-up process with assistance from the Field Elections Deputy or the Elections Office. In cases of voting equipment failures the Field Elections Deputy was able to replace the equipment which failed.

Several members of the Jury and poll workers commented that the classroom at the Rood Center is too crowded. The Grand Jury recommends the training sessions be conducted in a larger venue.

Findings that relate to this report

- F1** The Jury found the crowded conditions of the room used for training resulted in ineffective training outcomes.
- F2** The Jury found not all instructors ensured that every attendee received hands-on equipment training.
- F4** The Jury found that failure on the part of some poll workers to refer to check lists and the *Opening Flip Books* resulted in some equipment apparently not functioning properly.

Recommendations that relate to this report

- R1** The Nevada County Clerk Recorder should direct staff to:
 - identify a larger venue to more efficiently accommodate the number of trainees per training session,
 - increase the number of training classes given to the poll workers with fewer numbers of trainees in each class,
 - require the instructors to verify with each precinct team that they can demonstrate their competence in setting up the equipment before leaving the training class

Summary of Responses

F1 The Jury found the crowded conditions of the room used for training resulted in ineffective training outcomes.

Partially Agree:

The space that was available resulted in crowded conditions; however, the training outcome was successful as reflected in Election Day performance.

F2 The Jury found not all instructors ensured that every attendee received hands-on equipment training.

Agree

F4 The Jury found that failure on the part of some poll workers to refer to check lists and the Opening Flip Books resulted in some equipment apparently not functioning properly.

Agree

Recommendations that relate to this report

R1 The Nevada County Clerk Recorder Should Direct Staff to:

- Identify a larger venue to more efficiently accommodate the number of trainees per training session.

The recommendation will be implemented, beginning with the June 2014 Poll Worker Training.

- Increase the number of training classes given to the poll workers with fewer Numbers of trainees in each class.

The recommendation will not be implemented because it is not warranted or is not reasonable. By securing a larger facility to accommodate our training needs we hope to decrease the number of classes and increase the number of trainers at each class to ensure effective training.

- Require the instructors to verify with each precinct team that they can demonstrate their competence in setting up the equipment before leaving the training class.

The recommendation will be implemented, beginning with the June 2014 Poll Worker Training.

Attachment B

Previous Report Findings and Recommendations by the 2014-2015 Nevada County Grand Jury

November 2014 General Election in Nevada County

Summary

The Nevada County Grand Jury has monitored General Elections since 2008 and has subsequently issued reports on those elections. Primary Elections in those years were not monitored.

The Jury attended the poll worker training, provided by the Nevada County Elections Office, prior to the November 2014 General Election. The Nevada County Grand Jury also reviewed training documents, including the Poll Worker Training Manual provided to poll workers, procedures and processes of the Nevada County Elections Office and the applicable sections of the California Elections Code.

The Jury observed the Nevada County General Election on November 4, 2014, by visiting most of the 52 precincts in Nevada County. The Jury also interviewed poll workers and staff of the Nevada County Elections Office.

The Jury received a complaint from a citizen subsequent to the General Election. The complaint alleged mismanagement of the election process in Nevada County, inadequate training for potential poll workers prior to the election and a lack of consistency in the application of policies, processes, rules and laws by poll workers during the election.

The Nevada County Elections Office has the responsibility of selecting polling places in accordance with the California Elections Code. Each polling place contains one or more precincts. Each precinct is staffed by poll workers consisting of an Inspector and two or more Judges. The Inspector has overall responsibility for the activities of that precinct. All poll workers are volunteers.

During interviews conducted with poll workers, it was determined that some Inspectors and Judges did not receive adequate training. This resulted in some problems with check-in procedures and equipment. Overall, Election Day could be improved with additional training, updating the Poll Worker Training Manual to correct inconsistencies, and providing additional directional signage to direct voters to the polling places.

Findings that relate to this report

- F1** The training did not require demonstrated competence and capability by each poll worker in the use of equipment.
- F2** Mock-board demonstrations were ineffective for some poll workers.

- F3 Training material and some verbal instructions provided inconsistent and contradictory information.
- F4 The training did not require demonstrated competence and capability of each poll worker to understand and consistently apply proper procedures.

Recommendations that relate to this report

- R1 Provide additional and effective training for all poll workers to personally demonstrate their ability to perform their duties on Election Day.
- R2 Review, edit, and implement changes to the *Poll Worker Training Manual* to ensure consistency in instructions given to poll workers.

Summary of Responses from the Elections Office

- F1 The training did not require demonstrated competence and capability by each poll worker in the use of equipment.
Partially Agree:
It is true that we cannot verify that all 300 poll workers demonstrated competence and capability in the use of equipment. The inspector of each precinct was provided with one hour of in-depth training on the new electronic poll book equipment. They were asked to be the operators of the e-poll books on Election Day and provide hands-on training to the judge whom they chose to be their backup worker. The inspector handles assigning their board members to their particular positions for the day. Due to position assignments, not all poll workers need to demonstrate competence and capability of all the equipment.
- F2 Mock-board demonstrations were ineffective for some poll workers.
Partially Agree:
The Elections Office found the mock board demonstrations to be beneficial for training our inspectors involved in the November 2014 election. These mock election exercises allowed our department to evaluate the inspectors and gain insight as to what extra support would be required on Election Day.
- F3 Training material and some verbal instructions provided inconsistent and contradictory information.
Partially Agree:
The one inconsistency found in our training material dealt with issuing an e-Slate ballot vs. paper ballot for provisional voters. We ask that provisional voters use an e-slate ballot because reconciling the provisional vote, during canvas, is more efficient and accurate with the e-slate ballot. A provisional voter can always ask for a paper ballot. Our verbiage on this issue will be much clearer in subsequent elections. The Nevada County Elections office is always striving to make our training materials easy to understand. We review and make changes to the materials after each election based on feedback.

- F4** The training did not require demonstrated competence and capability of each poll worker to understand and consistently apply proper procedures.

Partially Agree:

The required procedures for checking in a voter are stated on the e-poll books. The new equipment is programmed with prompts that poll workers are required to follow on Election Day. It is challenging to ensure that in excess of 300 poll workers follow the procedure at all times. Thus, this is a solid example of why we request the inspectors to place their most competent poll workers in the areas that require the most attention to detail.

- R1** Provide additional and effective training for all poll workers to personally demonstrate their ability to perform their duties on Election Day.

The recommendation has not yet been implemented, but will be implemented in the future:

The poll worker training project will include additional training for the June 2016 Presidential Primary Election Poll Worker Training program.

- R2** Review, edit, and implement changes to the *Poll Worker Training Manual* to ensure consistency in instructions given to poll workers.

The recommendation has not yet been implemented, but will be implemented in the future:

The project will be completed in the new Poll Worker Training Manual for the June 2016 Presidential Primary Election.

Attachment C

Excerpts from 2016 Poll Worker Training Standards State of California Secretary of State Alex Padilla

(<http://elections.cdn.sos.ca.gov/poll-worker-training-standards/poll-worker-training-standards.pdf>)

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Section 4: Assuring Security of and Troubleshooting Problems with Voting Systems Set-Up

Training should include clear descriptions of security mechanisms used to ensure materials and equipment are in proper condition. Training for poll workers responsible for operating voting equipment on Election Day should also include hands-on setup of voting equipment, stressing the importance of using all required security measures for a given system.

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Section 5: Operation of Voting Systems Hands-On Training

- Hands-on training will reduce the number of problems on Election Day. The county elections official should determine which poll workers receive hands-on training with the voting system they will use on Election Day and how long the training should last, much of which will depend on the voting system's complexities and how long the system has been used in the county.
- If a voting system has more than one piece of equipment, poll workers should have hands-on training on each piece of equipment. Some voting systems may not require significant training time, and many returning poll workers may already be proficient in the operation of the system. Poll workers at locations using a different voting system for the first time should be given hands-on training.
- Role-playing is often an effective way to teach ways to correct common misunderstandings such as whether a battery is running low or the paper is jammed in a machine.
- Poll workers should receive hands-on training on how to set the machines up on Election Day and how to activate any special features for voters with disabilities. Poll workers should be familiar with common errors and receive hands-on training in how to correct those errors.

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Section 7: Poll Worker Training Methods and Materials

The goal of training is to ensure poll workers are prepared to correctly perform their duties on Election Day to best serve the voters. Training sessions aim to help poll workers retain as much information as possible for later use on Election Day. Studies have shown that poll workers – like all adult learners – learn best during short, interactive training sessions and hands-on instruction.

Trainers should be aware that the poll worker need for instruction will differ and, where possible, trainers should provide learning opportunities to meet all poll workers' needs. Keep in mind the amount of information the poll workers need to learn and the limited time elections officials have to convey that information to their poll workers.

Training for Election Day

Training sessions about Election Day rules and procedures should be based on specific learning objectives. Training blocks of time can be tailored around objectives and activities like lectures, demonstrations, or small-group breakout sessions. If the overall time for training requires breaks, carefully monitor break time to help poll workers stay focused throughout the session.

In addition to training poll workers on the laws, rules, and regulations they need to follow, there should also be a training session specific to the voting equipment that will be used on Election Day. Training should occur as close as possible to Election Day in order to increase the ability of poll workers to retain the information. Ideally, training should not happen more than six weeks before the election.

Training should be offered during evenings and weekends so a variety of people have opportunities to be poll workers.

The most effective training for poll workers comes out of discussion between the trainers and the trainees. To promote discussion, training sessions should include:

- Role-playing
- Setting up mock polling places
- Hands-on exercises with voting equipment
- Team exercises
- Questioning the poll worker trainees

Guest speakers who have experience with unusual situations at the polling place can sensitize poll workers to the needs of certain voters. Videos that show different situations (such as accommodating voters with different disabilities) provide good visual information in a short period of time.

Studies indicate that lecture formats and multiple-choice tests are the least effective methods for training adults. If a county elections official relies on lectures, those lectures should be supplemented with hands-on exercises or role-playing in order to be more valuable.

Trainers should start each session by providing an overview of what will be covered in the training. The goal and purpose of each lesson should be clearly stated before it is taught and should be summarized at the end. Adults tend to retain information when they understand why it is being taught to them, so trainers should attempt to offer explanations whenever possible.

Soliciting comments from the poll worker trainees during exercises can reinforce the material being taught. Trainers should use positive feedback when responding to questions. Rather than saying that an answer is wrong, it is best to identify an accurate piece of the answer and use that to provide a fully correct answer.

It may be beneficial to partner with local continuing-education professionals who can "train the trainers," since these professionals are familiar with the most effective adult learning techniques.

Roving polling place inspectors should also receive ongoing training to enhance their skills. The training sessions should be interactive as well, engaging the roving inspectors in role-playing, hands-on exercises, and question-and-answer sessions.

Use Materials That Will Be Used on Election Day

Election Day materials should be used during training sessions. Poll workers should be asked to find certain sections in the documents or conduct exercises that require them to use the materials. Handouts should be easy to read, be as short as possible, and be presented in the order that they will be used on Election Day. Materials should include graphics and have the most important information in the most visible places (e.g., diagrams and bulleted tips on effective polling place setups). Poll workers should receive these materials at the training sessions and then be allowed to take them home. Poll workers should be directed to bring along the same materials when they report to work on Election Day.

A flipbook format can be used to consolidate information such as detailed step-by-step instructions for opening and closing polls, and "what to do if ..." scenarios. Tabbed flip pages make finding information easy and reduce the risk that poll workers will misplace various sheets of paper.

Additional Workshops or Clinics

Counties may also wish to consider providing poll worker training workshops or clinics in the days leading up to Election Day. A clinic can be housed at the county elections office. Clinics allow poll workers to test their ability to use voting systems and test their knowledge of common issues they could face on Election Day. Counties might even consider offering an additional small stipend for poll workers who attend for refresher training or for people who are willing to be available as back-up poll workers in case scheduled workers have to cancel at the last minute.

At-Home Training Options

Online poll worker training courses can be used effectively to supplement hands-on instruction, but not to replace it. If possible, training and reference materials should be made available in both online and hard copy formats.

Even experienced poll workers can learn from take-home videos or other media, especially if changes or additions to past practices are highlighted in the training materials. Training videos that show poll workers dealing with voters with disabilities can provide a greater understanding of how people with disabilities actually use voting equipment.

A take-home or online self-testing process may be used to evaluate how effective poll worker training efforts have been. This approach enables poll workers to assess their skills, helps identify people who may no longer be able to perform the job adequately, and highlights training that need to be improved.

Measuring Success

Finally, it is important to measure the effectiveness of training programs. After each training session, poll workers should be asked to fill out forms that assess the quality of the training. Counties can also improve future training by having poll workers complete post-election response forms to evaluate the complete experience.

Performance Review of Poll Workers and Training

Counties should establish methods and/or improve existing methods for reviewing poll workers' performance and their own performance. Poll workers should be evaluated based on key duties with the goal of continuous improvement, while the county may learn how to improve its training methods or how it can reallocate the best workers to busier precincts and troubleshooter duties.

County elections officials may also want to establish ways for poll workers to provide feedback on additional topics that should be covered in future training, based on their Election Day experiences.

Attachment D



(<http://www.sos.ca.gov/elections/voter-registration/votecal-project/about-votecal/votecal-overview/>)

VoteCal Overview

When completed in 2016, VoteCal will provide a single, centralized voter registration database that will provide five major benefits to California's voters:

Publicly Available Website

Voters will be able to access certain public portions of VoteCal to:

- Apply to register to vote or update their voter registration record.
- Find their polling place.
- See if their vote-by-mail or provisional ballot was counted by their county elections official and, if it wasn't, the reason why it wasn't.

A Complete Index of Voter Registration Records

VoteCal will maintain all of the voter registration information for all voters in all 58 counties. County elections officials will be able to research a voter's registration and voting history, store voters signature records, and much more.

A Single Place for List Maintenance Functions

"List maintenance" is the process county elections officials use to ensure their voter registration lists are up to date and accurate. County elections officials will use VoteCal to check for duplicate registrations, move a voter's record from one county to another when the voter moves, check registration records to ensure voters have not been convicted of a crime that would preclude them from voting, and much more.

Assist Local Officials in Setting Up Elections

VoteCal will be used by county elections officials to help set up their elections. This will include placing voters into election precincts, determining which local, state, and congressional districts the voters fall into, keeping track of the political party preferences of each voter, and ensuring voters receive the state voter information guide for statewide elections and sample ballot pamphlets for all elections.

Reports

California law requires county elections officials and the Secretary of State to produce a number of reports, including the Report of Registration that breaks down California's registered voters

into various categories, and the Statement of the Vote issued after each state election. All of these public reports and many others will be produced through VoteCal.

How VoteCal Will Operate

To perform its many functions, VoteCal will have to interact and exchange information with many other state and county information systems:

County Election Management Systems (EMS)

County elections officials use their EMSs to register voters and update voter information. Once VoteCal is in place, that information will be fed into VoteCal. Right now, that information is uploaded nightly to the existing CalVoter system, but under VoteCal, the goal is to process the information as close to real-time as possible.

California Department of Corrections and Rehabilitation (CDCR)

Voter registration applications and existing voter records are run against the CDCR database. Any applicant who is confirmed to be a felon will not be registered to vote and any existing registrant who is confirmed to be a felon will have his or her voter registration canceled.

California Department of Public Health (CDPH)

Voter registration applications and existing voter records are also run against the CDPH database. Any applicant who is confirmed to be deceased will not be registered to vote and any existing registrant who is confirmed to be deceased will have his or her voter registration cancelled.

California Employment Development Department (EDD)

VoteCal will exchange information with the EDD to get address change information for voter registration records. If a voter's address has changed, his or her information will be updated in VoteCal and the voter's registration record and voting history will be transferred to the voter's new county.

California Department of Motor Vehicles (DMV)

VoteCal will interact with the DMV for two main reasons:

- When a voter updates his or her address with the DMV and wants to update his or her voter registration record at the same time, that information will flow from the DMV to VoteCal and then to the county elections officials.
- When a voter applies to register to vote online, he or she has the option of using his or her signature on file with the DMV to "sign" the application. VoteCal will retrieve signatures from the DMV, append them to the voter's application, and store them for access by county elections officials.

Attachment E

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Senate Bill 450 (in part)

(http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201520160SB450)

This bill, the *California Voter's Choice Act*, would, on or after January 1, 2018, authorize specified counties, and on or after January 1, 2020, authorize any county except the County of Los Angeles, to conduct any election as an all-mailed ballot election if certain conditions are satisfied, including conditions related to ballot drop-off locations, vote centers, and plans for the administration of all-mailed ballot elections.

(E) (i) The vote centers provided under this section have an electronic mechanism for the county elections official to immediately access, at a minimum, all of the following voter registration data:

- (I)** Name.
- (II)** Address.
- (III)** Date of birth.
- (IV)** Language preference.
- (V)** Party preference.
- (VI)** Precinct.
- (VII)** Whether or not the voter has been issued a vote by mail ballot and whether or not a ballot has been received by the county elections official.

(7) (A) Beginning 10 days before the election, the county elections official maintains, in an electronic format, an index of voters who have done any of the following at one of the voter centers established pursuant to this section:

- (i)** Registered to vote or updated his or her voter registration.
- (ii)** Received and voted a provisional ballot or replacement ballot.
- (iii)** Voted a ballot using equipment at the vote center.