



**30th Annual
National Conference
San Francisco, CA**

**2014 Professional Practices Program
Munch & Learn
A Method of Providing
Enhanced Election Worker
Training**

Osceola County, Florida

Submitted by:

**Mary Jane Arrington
Supervisor of Elections
2509 E. Irlo Bronson Memorial Hwy.
Kissimmee, FL 34744
407.742.6000
Maryjane@votesceola.com
www.votesceola.com**

Munch and Learn

A Method of Providing Enhanced Election Worker Training

Abstract of the Program:

In order to keep our election workers up-to-date on the most recent legislative changes, policies and procedures and to give them more practice on Election Day procedures, Osceola County Supervisor Mary Jane Arrington has implemented a new program – Munch & Learn.

Election workers attend training sessions held during lunch and dinner times on various days to go over issues, share ideas, and fellowship with other election workers while enjoying a meal.

“It was a very inexpensive way to train our election workers and keep them abreast of all the changes as well as give them an opportunity to enhance their skills and provide practice in procedures,” said Supervisor Mary Jane Arrington. “After each election we survey election workers to see which procedures they would like a skills refresher on and provide practice in those areas. This year we went over balancing procedures and management strategies for opening and closing the polling location – both areas election workers told us they find challenging on Election Day.”

Need for the Program:

Elections staff has found that providing continuing education opportunities to election workers with training sessions keeps them informed of any changes and acts as a refresher for their Early Voting and Election Day duties. Election workers feel more confident in the positions they hold after participating in a Munch & Learn training session.

“Practice always helps,” Supervisor Arrington said. “I had several of the election workers come up to me after the first Munch & Learn and tell me what a great idea it was and how they were glad to have had extra practice with some of the procedures. It was a good refresher class and helped them get back into election mode.”

Description of the Program:

Sessions were 90 minutes and designed as a skills training enhancement opportunity. Topics were presented using skill building exercises and scenarios for resolving problems and conflicts. Management tips were also given and class discussion was encouraged. Each Munch & Learn focused on one single topic. The first session focused on managing the opening and closing procedures at the polling location. The second Munch & Learn focused on balancing the polling location. Supervisor Arrington also used the time to update the election workers on legislative changes as well as notifying the election workers on specific information for the upcoming 2014 election cycle.

The cost of the Munch & Learn program was minimal with the only real expense being the cost of the food. Meals were bought from local restaurants and the event was held in the training

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room at the Supervisor of Elections office. Elections staff and trainers were used to teach the sessions and Power Point presentations were used to convey the information.

Participation in the Munch & Learn was voluntary and was directed at election workers specifically. No written exam was given, but participants were quizzed verbally.

“The categories we discussed during training were how to use certain organizational strategies to balance, ways to delegate tasks for closing, how to resolve conflicts and problem solving ideas,” said Tammy Smith, trainer for the Munch & Learn program and the Election Worker Coordinator for the Elections Office.

Class evaluation surveys were emailed to each participant and results were reviewed with trainers.

Results of the Program:

The feedback on the Munch & Learn program was overwhelmingly positive.

“Several people said they would love to see more sessions on other topics,” Smith said. “The most requested future topic is a session on provisional ballots. They really liked that we focused on one topic and we didn’t try to include additional information. A lot of the election workers said they also thought the 90 minute sessions were just the right amount of time.”

The presentations were filled with helpful tips on how to handle various scenarios and also the main issues that may come up while balancing at the end of voting. Election workers who attended the sessions asked for the balancing strategies discussed by the trainers to be included in their Training Manuals.

The new program also had the side benefit of renewing and building relationships between election workers while having a good meal and a refresher course on procedures.

“Some of the election workers hadn’t seen each other since the previous election,” Supervisor Arrington said. “They were able to catch up and also discuss ideas for the upcoming elections. It was also a good opportunity for election workers who will be in new polling locations this year to meet with other people from that location. I am very pleased with how well the Munch & Learn sessions were received. It is something we will be adding to our training schedule for future elections.”

Arrington said the Munch & Learn Program is something all election offices can implement for very little cost and see big results in more thoroughly trained and enthusiastic election workers.

“From large Election Offices to smaller Election Offices, this is something I would recommend adding to their training programs. It is a great way to build camaraderie between election workers in an election year and keep procedures fresh in their minds.”



THE SUPERVISOR OF ELECTIONS PROUDLY PRESENTS



Join us for a delicious meal and learn tips and strategies for managing Election Day activities. Learn how to minimize stress and maximize results to have the best Election Day experience ever! With two different topics, you can attend one or both; attendance is voluntary.

TOPIC: Opening & Closing the Polling Place

Learn helpful strategies for managing opening and closing of the polling place on Election Day!

MARCH

11

Lunch: 11:30 AM to 1:00 PM } Choose One
Dinner: 6:00 PM to 7:30 PM }

Location: Elections Office, 2509 E. Irlo Bronson Memorial Hwy.

TOPIC: Election Day Balancing

Learn strategies to help effectively balance your polling place on Election Day!

MARCH

18

Lunch: 11:30 AM to 1:00 PM } Choose One
Dinner: 6:00 PM to 7:30 PM }

Location: Elections Office, 2509 E. Irlo Bronson Memorial Hwy.

Seating is limited, so call now to reserve your time!
RSVP by March 7th by calling Tammy Smith at 407.742.6000



Opening Procedures for Clerk

Clerk's Name: _____

Precinct(s): _____

As the Clerk you are responsible for managing the polling location and are required to contact the Elections Office as soon as you are in the polling place. You are required to:

- ___ Arrive at the polling place at 6 a.m.
- ___ Turn on the cell phone you were assigned, make sure the volume is set on high and call the Election Office Phone Bank. The phone bank will begin taking calls at 5:30 a.m. **If you have any issues gaining access into the polling location or with set up, contact the phone bank immediately**
- ___ Have everyone synchronize their watches to the time on the cell phone you have been assigned.
- ___ Verify Clerk's Cabinet seal matches the seal number on the Ballot & Equipment Reconciliation form.
- ___ Remove the seal on the Clerk's Cabinet so the poll workers can retrieve their kits.
- ___ Use the Payroll/Attendance sheet to confirm all workers are present. Call out each name and place a check mark next to the name of each poll worker who is present. **Poll worker positions are outlined on the Payroll/Attendance sheet and should not be reassigned.**
- ___ Contact any missing workers. If the worker is unable to work, contact the phone bank immediately (you may be assigned a replacement or given directions on how to proceed).
- ___ Administer the oath to all poll workers and have them sign (located on the Ballot & Equipment Reconciliation Form). The VIS will administer the oath to the Clerk.
- ___ Issue each poll worker their opening procedures.
- ___ Issue the keys to DS200 and AutoMark unit and cell phone to Tech
- ___ Give Tech copy of the DS200 Quick Reference Guide (located in the Clerk/VIS Kit Bag)
- ___ Clerk will need to:
 - ___ Verify the black box is empty
 - ___ Verify and sign the zero tape on the DS200 machine
 - ___ Sign the AccuVote and TSX Memory Card Seal Certifications.
 - ___ Record the beginning count (should be zero) for the DS200 machines on the Ballot & Equipment Reconciliation Form
 - ___ Swipe Security Card on all EVIDs
- ___ Contact the Elections office at 6:30 a.m. to report status of all equipment (all equipment should be up and running)
- ___ Verify the ballots issued match the ballot information on the Ballot & Equipment Reconciliation Form
- ___ Issue ballots to EVID Operators and the Spoiled Ballot Envelope
- ___ Verify the 100ft no solicitation zone has been marked
- ___ Verify signs have been put up:
 - ___ All secrecy booths are up (including cardboard box booths, if any were sent w/light)
 - ___ Back up battery has been plugged into the Clerk/VIS EVID
 - ___ Select Accompanist who will ride with Clerk back to the Elections Office after the polls close to return the required items.
- ___ Polls open at 7 a.m. The Clerk will inform the Deputy when it is 7:00 a.m. and the Deputy will go to the door of the polling location and announce "The polls are now open"

CLERK CLOSING PROCEDURES

After the last voter is processed and has left the polling location, you may instruct the poll workers to start with closing down the site. Issue them their closing procedures. As clerk it is your responsibility that all closing procedures are followed and the required items returned to the Elections Office Election Night. You will make sure of the following:

- ___ Issue closing procedures checklist to each poll worker
- ___ Check that the ballot box is empty (emergency and main compartment)
- ___ Note the Ballot & Equipment Reconciliation Form with the total votes on the DS200
- ___ Sign the DS200 Totals Tape

You are now ready to balance and will need the following information:

- All EVID - Voting passes - Start Up Tickets - Totals Tapes
- Precinct Registers (if used)
- Provisional ballots counted and placed in the orange Provisional Ballot Bag
- Undo Log
- Unscanned Ballot Envelope
- Spoiled Ballot Envelopes
- Balancing & Equipment Reconciliation Form (complete all sides of the form)
- Unused ballots accounted for and placed in the box the ballots came in

___ After you have balanced the site, you will need to complete the following forms:

- Incident Report (even if no incident occurred)
- Pollworker Evaluation Forms

___ Use the seals provided to seal and secure the:

- Red Multipurpose Bag (after all required items have been packed and checked off the list)
- Use tape to seal the unused ballots in the brown boxes and have poll workers sign the tape
- Clerk's Cabinet (after all required items have been packed and checked off the list) - document seal number on the Ballot & Equipment Reconciliation Form.

___ Make sure the following items are packed and ready for the movers to pick up:

- Clerk's Cabinet
- Closed & stacked secrecy booths
- All signs inside and out

___ Use the Payroll/Attendance Sheet to issue the payroll checks to each of the poll workers. Have each poll worker sign the sheet to confirm receipt of their checks.

___ Clerk and Accompanist will return the following items to the Elections office Election Night:

- DS200 Unit
- Cell phones.
- Keys to the polling location (if applicable)
- Keys to Clerk's Cabinet
- Blue ballot totes
- Red Multipurpose Bag
- Clerk/VIS sign has been placed in the front dashboard of the car

___ Make sure the polling place has been cleaned up, lights turned off and room has been locked and

RECONCILIATION TIPS

TIP # 1

EViD Totals Are Less Than The Tabulation Count

Explanation: This can occur when a voter is not processed through the EViD, but given a ballot and the ballot was cast.

Resolution:

- **Did you have a power outage and use the precinct registers?** Check precinct register for voters.
- **Did a worker give a voter a ballot from a Refer to Clerk Ticket?** If a Refer to Clerk ticket is found in Voting Pass box, use the "Who's Voted" button to research if the voter voted. Call the phone bank and explain the situation. Phone bank will advise how to proceed.
- **Did a worker give a precinct ballot in exchange for the voter's absentee ballot?** Use the "Who's Voted" button to research if the voter voted. If the voter has not voted and adding this person back into the count will balance your polling place, call the phone bank and explain the situation. Phone bank will advise how to proceed.

TIP # 2

EViD Totals Are Higher Than The Tabulation Count

Explanation: This can occur when a ballot has been issued to a voter, but the ballot was not scanned by the tabulation machine

Resolution:

- **Verify unscanned ballot count.** Recount ballots in the Unscanned Envelope. Check the emergency compartment for missing unscanned ballots.
- **Verify number of provisional ballots.** Recount the provisional ballot envelopes. Check the emergency compartment for missing provisional ballots.
- **Voter left with a ballot.** If you believe a voter left with a ballot, contact the phone bank and explain the situation. Phone bank will advise how to proceed.
- **Voter who was issued a ballot leaves before casting the ballot.** Verify undo check-in procedures were followed. Call the phone bank and explain the situation. Phone bank will advise how to proceed.

TIP # 3

Ballots Used Are Higher/Lower Than Ballots Cast

Explanation: This can occur when there is an error counting ballots or the math is incorrect.

Resolution:

- **Recount partially used ballot pads.** Count only the ballot stubs with no ballot attached.
- **Recount empty ballot pads.** Stubs only, not ballots attached.
- **Recount Spoiled ballots.**
- **Recount Unscanned ballots.**
- **Recount Provsional ballots.**
- **Verify math on the "Ballots Used Worksheet" section of the balancing form is correct.**