

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

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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>

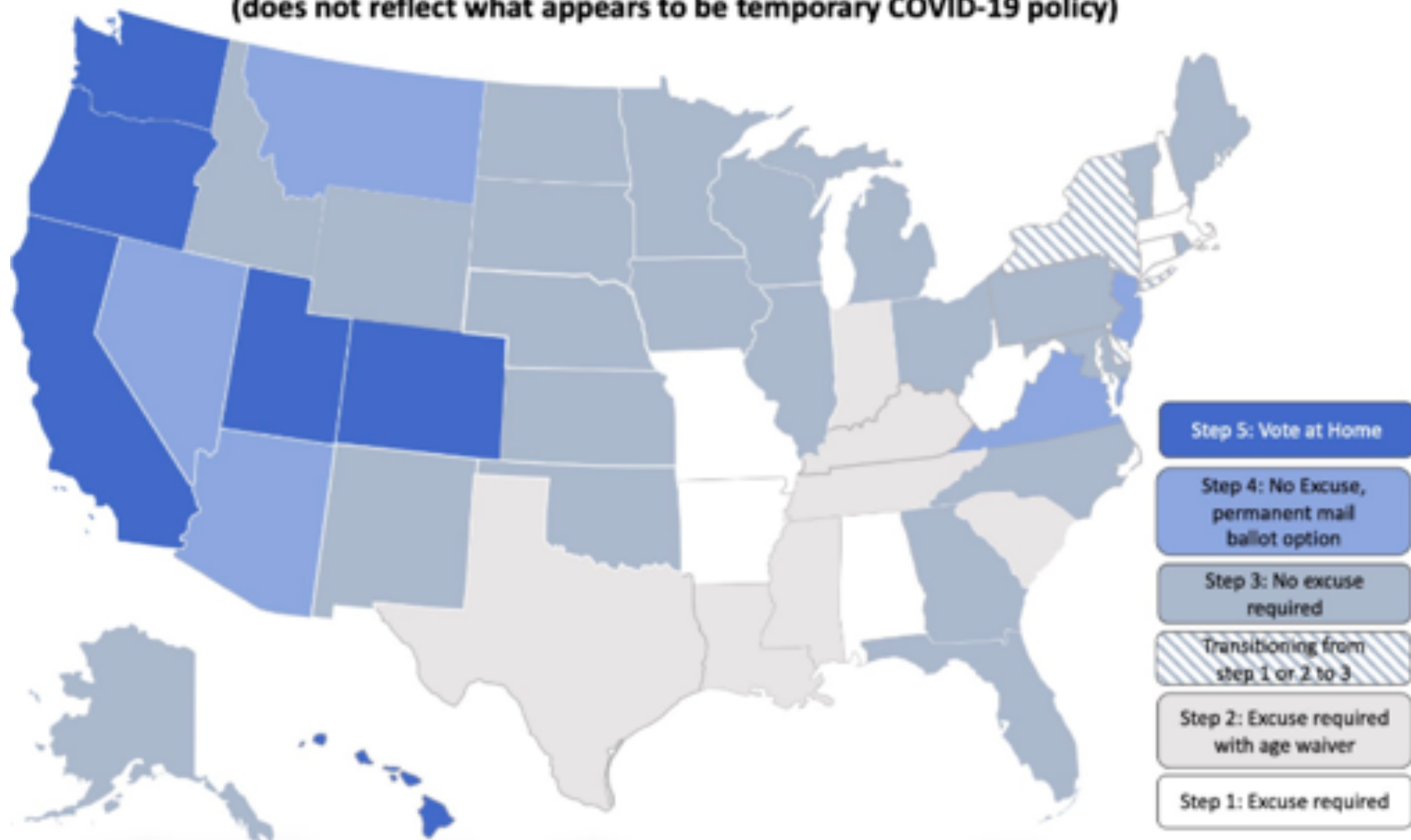
Keep in mind

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)



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

Voter outreach

Voter registration processing

Request processing

Ballot preparation

Return ballot handling

Ballot counting

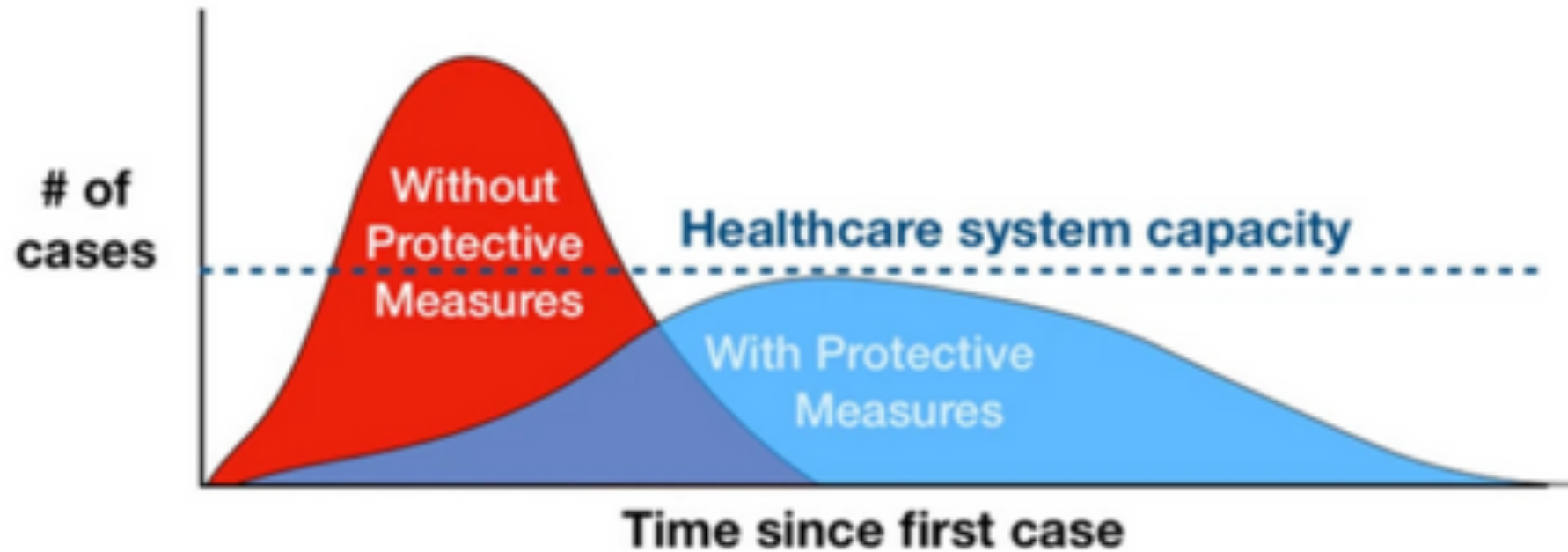
Request processing

1.5 - 2.0 full time staff

for the three weeks leading up to Election Day

for jurisdictions with 30,000 registered voters.

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



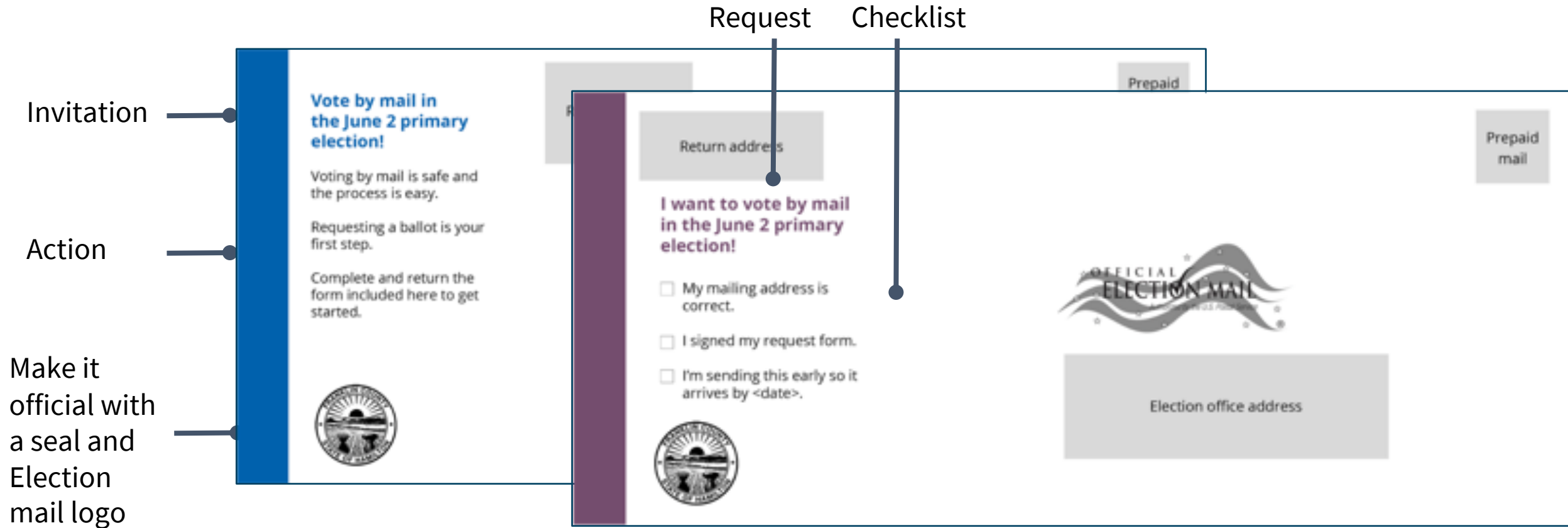
Send communications and reminders when voters can act on them, or as close to when they can act as possible

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



An invitation...to make a request

Use it to help voters understand the process


State Board of Elections
8231 Pecan Street
Franklin, ST 99999-1234


Presorted
First Class Mail
U.S. Postage Paid
City, ST
Permit no. 12345

RETURN SERVICE REQUESTED

**Be ready to vote in
the November 3rd,
2020 General Election**


Request your absentee ballot by
[date]

 Online
yourwebsite.gov

 By phone
Name County Clerk
(843) 555-5555
elections@county.gov


**OFFICIAL
ELECTION MAIL**
Approved by U.S. Postage


Frequent Voter
1234 State Road
Jackson, ST 99999-1234




You can vote safely in the [date] election

All voters can vote with an absentee ballot...no excuse needed.
Getting your ballot is easy.

 Complete a request form at [yourwebsite.gov](#) by [date]
Or, call your county clerk

 You'll get your ballot in the mail to mark at home.
Put your voted ballot in the pre-paid return envelope.
Don't forget to sign the back of the envelope.

 Mail the ballot back to the elections office, postmarked by
Election Day, [date].
Check that your ballot was received at [yourwebsite.gov](#)

For more information about safe voting, including early voting and
Election Day options, visit [yourwebsite.com](#)

Twitter Facebook Instagram Email

Invitation

Action

Correct
info

Why

What this
is about

How it
works

Learn
more

Think about the messages

Address side	Message side
<p>Be ready to vote in the June 23 Primary Election Request your absentee ballot by June XX</p>	<p>You can vote safely in the June 23 Election All voters can vote with an absentee ballot...no excuse needed.</p>
<p>Vote safely in the June 23 Primary Election Request your absentee ballot by June XX</p>	<p>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.</p>
<p>Vote from home in the June 23 Primary Election Request your absentee ballot by June XX</p>	<p>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.</p>

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

General Election: November 4, 2014 — Polls open from 7am to 8pm

Do you want to vote by mail?
Return this application by mail or at the Elections Office by October 23, 2014.
Address where you are registered to vote:
1234 PLEASANT ST
REDDING CA 96001-1234

Mail my ballot to: Same as above OR

Street _____
City _____ State _____ ZIP _____
Phone _____

If you want to vote by mail in every election, initial this box. You will get your ballot by mail for every election in which you are eligible to vote.

Voter: sign here Power of Attorney not acceptable
I certify under penalty of perjury under the laws of the State of California that the contents of this application are true and correct.

Your polling site:
NEW LIFE CENTER
10582 OLD OREGON TRL
REDDING CA 96003

Accessible:
Usable

452B020549

0214013254

*****AUTO**5-DIGIT 96089
KELLY ROBIN SMITH
1234 PLEASANT ST
REDDING CA 96001-1234
13254

0214013254 Precinct 000261
Ballot Type 14

Polling place
information

Voter
registration
lookup scan
code

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

Dear Voter,

If you want to Vote By Mail at the Nov. 3, 2020 General Election:

- Apply online at [\[redacted\].s.gov](#)
- Or
- Use the mail-in application below.

Note: If you apply online, don't use the mail-in form.

Apply Online
[\[redacted\].s.gov](#)
To Vote By Mail

PAT DOE
[redacted]

Voter Registration 78213AG
Precinct: 37 Ward: 33

7 8 2 1 3 A G - 3 7 - 3 3

Application to Vote By Mail for the Nov. 3, 2020 General Election

I hereby swear (or affirm) that I am the voter named above and I personally provided the signature below for my Voter Registration record and Vote By Mail application.

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

Help people who aren't already registered

Voters sign in to the portal

APPLY TO REGISTER TO VOTE

I am a Virginia resident. I am not registered to vote in Virginia and I want to apply to register to vote.

REGISTERED VOTER

Access your Virginia Voter Record to update registration, apply to vote absentee, and view your voter-related information.

First Name* Last Name*

Date of Birth* Last 4 of SSN*

Locality*
Choose a Locality

I certify and affirm that the information provided to access my voter registration is my own or I am expressly authorized by the voter to access this information. I understand that it is unlawful to access the record of any other voter, punishable as computer fraud under Va. Code § 18.2-152.3.*

Find

Voter Information

Voter Name: [REDACTED]

Voter Number: [REDACTED]

Status: Active

Date of Status: 10/15/2018

Residential Address: [REDACTED]
Richmond, VA 232275129

Locality: RICHMOND CITY

Precinct: 309 - THREE HUNDRED NINE

Precinct Code: 0309

I want to update my voter record

I want to apply for absentee voting

Continue

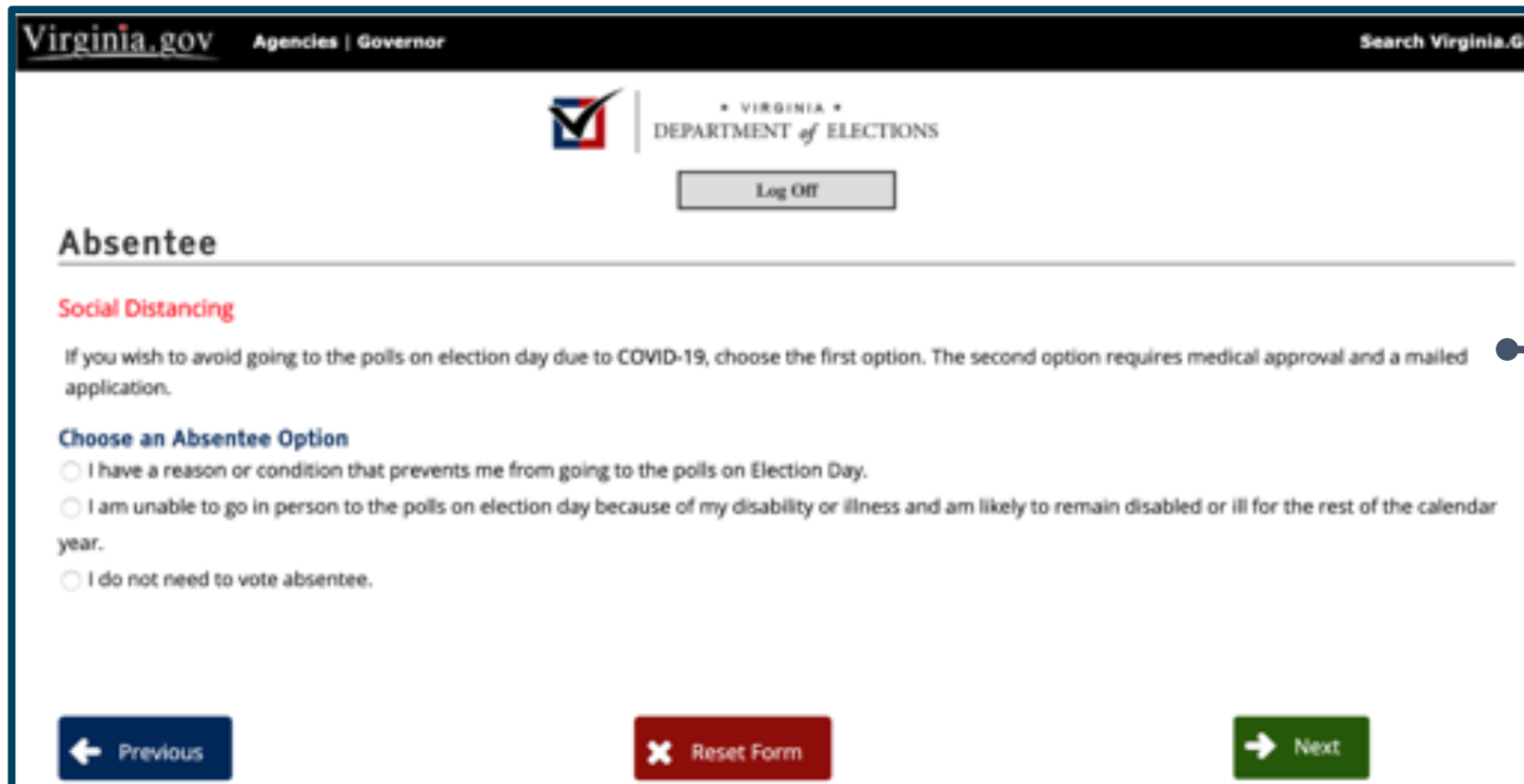
Confirm address

Update or Request a ballot

<https://www.elections.virginia.gov/casting-a-ballot/absentee-voting/>

Include any COVID instructions

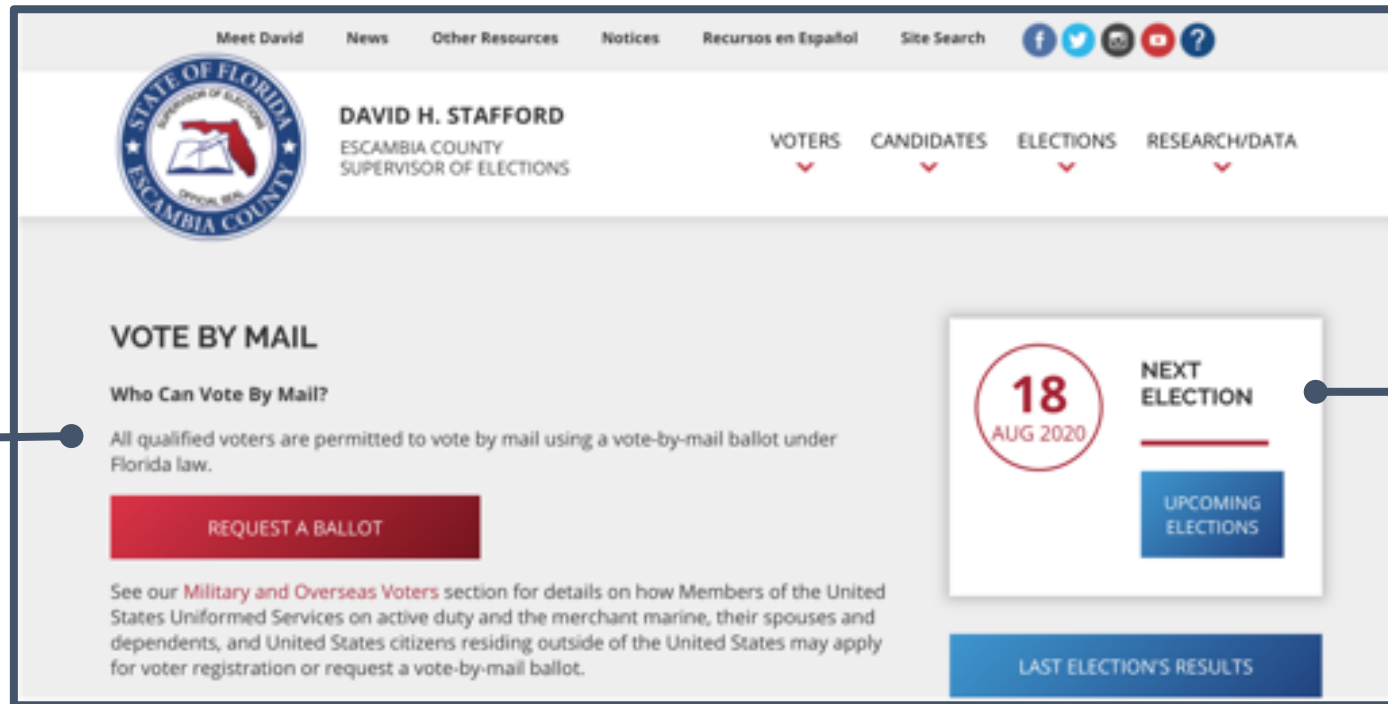
Help voters get it right



The screenshot shows the Virginia Department of Elections website. At the top, there is a navigation bar with "Virginia.gov", "Agencies | Governor", and a search bar. Below this is the department logo and a "Log Off" button. The main heading is "Absentee". Underneath, there is a section titled "Social Distancing" in red text, followed by instructions: "If you wish to avoid going to the polls on election day due to COVID-19, choose the first option. The second option requires medical approval and a mailed application." Below this is a section titled "Choose an Absentee Option" with three radio button options: "I have a reason or condition that prevents me from going to the polls on Election Day.", "I am unable to go in person to the polls on election day because of my disability or illness and am likely to remain disabled or ill for the rest of the calendar year.", and "I do not need to vote absentee." At the bottom of the form are three buttons: "Previous", "Reset Form", and "Next".

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



Explain the rules up front

When is the next election (or has the deadline passed for a current election)

<https://escambivotes.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?

[STATE] Request for Mail-in Ballot Page 1
Black ink only

Print your name
Use the name from your voter registration.

1 Last _____ First _____
Middle _____ Jr Sr II. III. IV (circle if applicable)

About you

2 Birth date (MM/DD/YYYY) _____
Last 4 digits of Social Security number XXX-XX-_____
[State] Driver's license (9 digits) _____
 I do not have a [STATE] driver's license, [STATE] ID card, or a Social Security Number

The address where you're registered to vote.
If you want your ballot mailed to another address, list that in section 4.

3 Street (no P.O. Box) _____ Apt. _____
City/Town _____ State _____ Zip code _____
County _____ I have lived at this address since (MM/YYYY) _____
*If rural address or homeless, describe residence _____

Where to mail my ballot

4 Same as above **-OR-** Address or P.O. Box _____
City/Town _____ State _____ Zip code _____

Election
Which election do you want a mail-in ballot for?

5 I am requesting a ballot for (check only one):
 All future elections (until I request otherwise in writing)
-OR- the next: General or Special Election Primary

Contact info
(optional) We'll only contact you if we have questions on this form.

6 Phone (with area code) _____ Email _____

Signature

7 I declare that I am eligible to vote by mail-in ballot at the forthcoming primary or election; that I am requesting the ballot of the party with which I am enrolled according to my voter registration record, and that all the information which I have listed on this mail-in ballot application is true and correct.

Voter sign here
X
Date (MM/DD/YY) _____

If you received help with this form
Complete only if you are unable to sign the declaration.

8 I received help completing this form due to a disability, blindness, or inability to read or write.
Printed name of assistant _____ Date _____
Signature of assistant _____ Address of assistant _____

Do you need a 'wet' signature?

What about:

- Driver's license
- E-signature
- Signature image

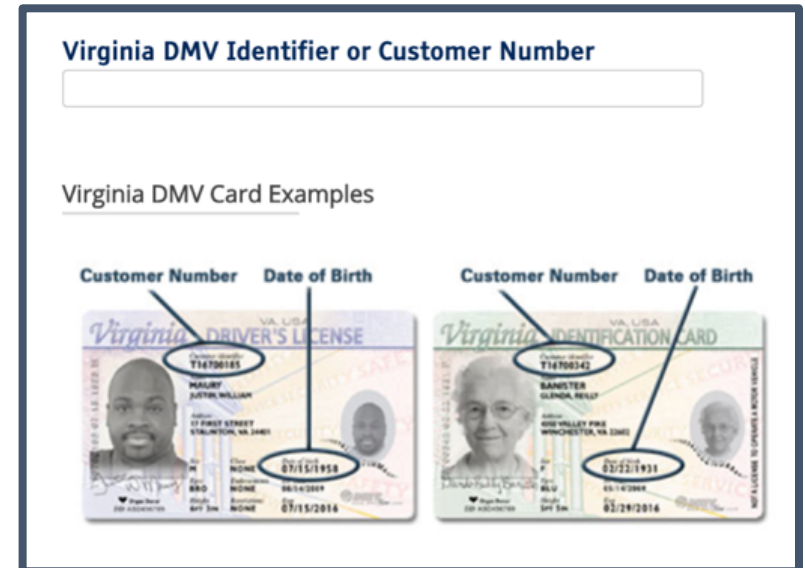
Inspiration: Pennsylvania

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

<https://www.ncsl.org/research/elections-and-campaigns/absentee-and-early-voting.aspx>

A quick rundown

CREATIVE APPROACHES AND USEFUL RESOURCES



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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



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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



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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)

techandcivicle.org/covid-19-webinars/

Thanks!

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