

**Secretary of State's Task Force
on Uniform Poll Worker Training Standards
Tuesday, September 21, 2004, Meeting Minutes**

10:05 a.m.: Chairwoman Freddie Oakley called the meeting to order with the following members present: Freddie Oakley, Bonnie Hamlin, Tom Stanionis, Luana Horstkotte. Via conference call: Barbara Jones, Geri Washington and Phil Ting

The following presenters were present: Michael Bell and Maria Mindlin.
Via conference call: Kathay Feng

The following Secretary of State staff members were present: Marc Carrel, Casey Elliott and Rachel Zenner.

Item I: Chairwoman Oakley welcomed the Task Force Members and thanked them for their service; indicated this is the third meeting; lots has been done; not a lot of time remaining; will discuss all issues and review the report prior to publishing. Any concerns regarding conduct of the Task Force can be discussed at the end of the meeting or can be emailed to her or Rachel Zenner.

Item II: Chairwoman Oakley introduced Maria Mindlin, Transcend, who presented "Cognitive Learning for Poll Workers."

- **Cognitive learning: how people learn.**
- Ms. Mindlin explained that she is not aware of the challenges, how everything happens, errors, or feedback from trainers for poll workers; her purpose today is to provide a lesson plan for county use.
- **Best training methods:** maximum participation is best along with multiple modalities (physical: move, touch, role play, speak); lecture format is the worst type of training; grouping (solo, pairs, groups – it is important to vary the grouping, make class fun, interactive fast-paced, but stay on task, set time limits, nudge, call students by name); practice lesson beforehand.
- Exercise: the group broke into pairs for two minutes and listed five things they, as poll workers, would have to do prior to Election Day. Discussion followed.
- Trainers should accept, validate or massage information; trainers should start with a question – gets student vested; integrate with Election Day materials (review Yolo Co. Poll Worker Guide), lesson should compliment materials and materials should compliment lesson; get Election materials in the students hands and talk about Election Day, have some students participate in role-playing and others evaluate; trainers should wear a nametag and give nametags to all participants at check in time; trainers should walk around classroom and listen to what students are talking about. Always advise students that the class will be interactive so they don't wonder why you are picking them for answers when they haven't raised

their hands. If you get off task, just say something like “We don’t have enough time right now, we’ll try and come back to that later or discuss it off-line.” Trainers should introduce themselves and set rules for the class at the beginning by saying, “This class is for you to help you prepare for Election Day, so speak your mind, please provide your honest opinion.” Ask that participants complete the feedback form at the end of the class.

- **Trainers best practices:** time yourself, stay on task; give big picture (today you will learn...); first lesson should start with a bang; varying techniques and grouping – let all students participate; use question and answer forum which gets students involved and allows the trainer to see if the students comprehend the material, allow students time (7 seconds) to process information and respond; get feedback – use last five minutes of class; if asking for additional comments provide an email address.
- Feedback: ask if the training was helpful? What parts were best? What parts need more work? Are there additional topics you would like more training? What will you do if you have a question on specific election materials?

Task Force Member Feng suggested poll workers participate in role-playing activities, i.e., Have poll worker sit at a table and have a voter approach the table and speak in another language. What would the poll worker do? Evaluate how the poll worker responds. Students learn the most with role-play exercises.

- Training and Election Day materials should be easy to read and as short as possible.
- Things to avoid: saying “no”; “you’re wrong”; don’t give multiple choice test (don’t expose students to wrong answers); chaos; off-task time; individualize answers (handle off-line).
- The more the teacher can be a facilitator, the students will learn more.

Chairwoman Oakley indicated that her county’s training was often in large groups, approximately 60 students. Should they break into 10 groups of six? Ms. Mindlin recommended doing it in pairs so the students don’t waste time moving around. Perhaps after a break, when they return, sit in smaller groups.

- Strongest Predictor of Successful Training: Teacher expectations!
Students will learn what they need to know; they will know where to find more information, if needed; enjoy class; feel valued, respected, and will recognize importance of their task.

Task Force Member Feng suggested telling students that a number of things will be accomplished in training. Poll worker training – do it in order of how the day progresses, i.e., open tub, unpack tub, set up on Election Day, etc. Previous feedback from poll workers indicate that it is very daunting the number of things that had to be done on Election Day.

Item III:

Chairwoman Oakley introduced Michael Bell who presented “Cultural Competency Training for Poll Workers.”

- Mr. Bell presented information on his report to San Mateo County titled “Poll Workers Diplomats For Democracy.”
- Four objectives to accomplish: understand the impact of demographic changes; learn new tools to work with different cultures effectively;

develop cultural awareness impact poll workers ability to effectively serve as dependable diplomats; and, understanding the responsibilities and behaviors expected from poll workers on election day.

- In order to accomplish the four objectives, engage poll workers with their own first-time voting experiences; solicit comments; identify the changes that have occurred in demographics in the county; and, provide poll workers three simple tools and set of behaviors to ensure success when working with voters on Election Day.
- Role-play to practice tools and get feedback.
- Ensure experience is good for first time voters so they will want to vote in future elections.
- One tool is to remember to slow down the “knee jerk” launch into a response but rather wait to process the question. Another tool is remembering Intent vs. Impact. Response may be seen as offensive but that wasn’t the intent. Ultimately, the voter may not want to come back for future elections.
- Focus on how to recognize other people’s feelings.
- Listen – don’t stereotype
- Design learning so people respond positively.

Chairwoman Oakley asked if there is an optimal training time, say 90-minutes? Ms. Mindlin responded that 60-minutes is best; however, if students are more involved then the training can go longer.

Chairwoman Oakley suggested hitting the high points in 60-minutes and adding 30 minutes if engaging in activities then break for lunch or end session. Task Force Member Hamlin requested a copy of Mr. Bell’s tool kit. Mr. Bell will send summary to Ms. Zenner.

Task Force Member Ting complimented Mr. Bell on a very effective training session in San Mateo.

Task Force Member Ting will forward to Rachel Zenner the Executive Summary portion of a large document, which will be helpful in regards to Cultural Competency when assisting Asian voters.

Item IV:

Chairwoman Oakley introduced Task Force Member Kathay Feng from the Asian Pacific American Legal Center of Southern California, who presented “Voting Rights” via telephone conference.

- Three handouts were distributed: Excerpts from Past APALC Poll Monitor Reports; Election Guide; poll monitor letter from the 2000 election to Conny McCormack. Task Force Member. Feng stated that the purpose of the letter was not to imply that LA County was not doing their job properly.

Scenarios at polling place during poll monitoring:

- Wrong information given to voters; first time voters were made to jump through hurdles; not told the correct polling place to go to vote; poll monitors were treated rudely and with hostility, questioned their credentials, told them to leave or stand in the corner; voters were told they could not bring anyone to assist them while voting; in one precinct, the poll worker, who was overwhelmed by the number of bilingual, senior citizens in line, told them that if they didn’t speak English, they needed to go to the

back of the line while the poll workers assisted the English speaking voters first.

Chairwoman Oakley stated that it important to train poll workers to know when to get assistance for voters and not create barriers.

Task Force Member Feng mentioned that sometimes the homeowner who has offered their home as a precincts will ask voters to take their shoes off before coming in.

Mr. Carrel stated it is intimidating to vote at a residence; better to vote at a public place.

What if the voter is not listed on the polling place roster?

- Recommended that poll workers ask the voter to write down his/her name to ensure proper spelling when checking the roster.
- Role-playing is important when training poll workers.
- Poll workers should have cell phone with a direct line to the Registrar's office, which will be available to them all day.

Larry Sokol of the Speaker's office, who was observing the task force meeting, stated that poll workers incorrectly ask all voters for ID as a matter of speed and convenience.

Chairwoman Oakley stated that asking all voters to show ID must stop since it would be intimidating to voters. The polling place roster will identify which voters must show ID.

Mr. Carrel stated that at the recent Nevada election, at one polling place in Las Vegas, particularly at early voting, every voter brought his/her sample ballot, which was scanned on a laptop to ascertain the voter's name and polling location. It was almost as though they trained the voters to bring the sample ballot to the polling place. Some California counties have this capability.

Mr. Sokol stated that poll workers must understand that they are to assist voters, not act as Election cops or limit the process. Primary responsibility is to assist voters.

Mr. Carrel suggested perhaps a "how am I doing" evaluation form which the voter completes regarding the poll worker. It would be better to not rehire a bad poll worker rather than rehire them just to ensure staffing

Mr. Carrel recommended poll workers give the voter three options: find the correct polling place, give the 1-800#, which is included on the Voter's Bill of Rights poster at all precincts, and/or offer a provisional ballot.

Chairwoman Oakley recommended giving the voter a provisional ballot. Some counties have maps posted that clearly identify correct polling places for each residence. Counties can get these maps from their Planning Dept.

Task Force Member Feng suggested that perhaps after 6 p.m. provisional ballots are issued to voters not on the roster. This would eliminate the possibility of delaying a voter who would have to go to another location and not arrive in time to vote.

Mr. Sokol expressed concern that when the voter is redirected to the correct precinct the voter may not take the time to go to the correct precinct to vote.

Mr. Carrel stated that the only disadvantage was some local office votes may not count or won't be included on the correct ballot, but all statewide office votes will be counted.

What is the new ID requirement for voting?

- Picture ID or proof of name and address from government ID for voters whose name is marked on the roster as requiring ID.
- No ID – issue a provisional ballot; most counties are using pink provisional ballots (perhaps a statewide campaign: “think pink” slogan).
- First time voters often feel embarrassed that they don’t know what to do while everyone else does. Poll workers should explain to these voters why the voter must provide ID and offer a comforting comment such as “you are not alone,” and perhaps explain the change in the law.

What should the poll worker do if the voter doesn’t have the correct ID?

- If a person is on the roster, they should be allowed to vote.
- Offer provision ballot.
- Explain that properly cast provisional ballots are counted.
- Provide county phone number to the voter to call, 30 days after the election, to see if their provisional ballot was counted.

Mr. Carrel indicated that the SOS is sending a survey to all counties to ascertain what each county is doing and what telephone number is being used. Task Force Member Washington concerned that provisional ballots are confusing and perhaps could cause a higher margin of error.

Chairwoman Oakley indicated that in Yolo County provisional ballots are very straightforward, voted like an absentee ballot; ensure a lower margin of error since signatures are checked prior to counting.

Voting Rights Act discussion:

- Vote without discrimination; bilingual assistance to be provided (nearly all counties need Spanish, seven counties need Asian languages). Democracy only works if everyone is voting. Voters should be able to read and understand the issues they are voting on. Bilingual ballots help.
- Polling place set up: Instructions should be clear and simple. Take bilingual materials out from tub and display it in a visible and accessible location; do a role playing exercise such as label all items in the tub in the order of the steps to follow on Election Day at the polling place and have poll worker set up and use the materials. Train the poll workers in the order of the set up for the day.
- What is the role of the bilingual poll worker? Bilingual poll workers should be made to feel comfortable. They are part of the team and do all the tasks of any poll worker, in addition to answering bilingual questions and assisting voters cast their ballots.
- How can a voter request translated election material? Voter should be directed to fill out a new VRC and check box 14 or call his/her county elections office.
- Poll workers, including the bilingual poll workers, can show voters how to use the voting machine and how to cast a ballot – no electioneering.
- If a voter brings someone to assist him/her while voting, poll worker is to allow the assistance.
- A voter can bring election material into the voting booth for his or her own use but no electioneering. The voter must remove it when finished voting.
- If someone wants to monitor or watch the election, the poll worker should allow it, give him or her the poll watchers guide; don’t be defensive. In

poll worker training, explain what poll monitors are there for – to ensure that voters have the opportunity to vote.

Mr. Sokol mentioned: If the poll worker is interrupting the voting process, the poll worker should be encouraged to call the Registrar's office.

- If a voter comes to a polling place within his/her county of residence and wants to vote but the roster indicates that an absentee ballot was issued to that voter, the poll worker should be instructed to allow the voter to vote a provisional ballot.
- Absentee ballots: can be dropped of at any precinct within the county of residence.

Item V:

Mr. Carrel asked what format for the report so he and Ms. Zenner can begin formatting.

Chairwoman Oakley asked what his preference was.

Mr. Carrel asked specific or broad with examples, or overly broad for counties to adopt?

Chairwoman Oakley recommended taking a middle ground format including citing what some counties are doing now. Counties don't like to be told to do things differently. The truth of the matter is that some counties will have to make changes. We will have to offer directives, rules, and best practices. All is accessible but not in an easy format to use. Not useful to be overly broad.

Mr. Carrel indicated that his section, at this point, is simply a listing of the rights of voters. In some ways poll workers need to understand the rights of voters and this report will provide some ways they can learn them.

Chairwoman Oakley indicated this report would provide a way for poll workers to know where to get the needed information.

Ms. Zenner indicated that we are missing items 8 through 12.

Mr. Stanionis suggested the counties put together a summary of what the goals are for poll worker training and then provide the details.

Mr. Stanionis will do item 9

Chairwoman Oakley will do item 10

Mr. Carrel will do item 8

Ms. Mindlin covered item 12 (Ms. Zenner will summarize)

Will need to schedule one more meeting after election and then submit for public comment prior to submitting to Legislature in January 2005.

1:10 p.m.:

Chairwoman Oakley adjourned the meeting.