## 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 poll workers' needs 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.

## Resources County Elections Officials Should Provide to Poll Workers

- **Hotlines for Poll Workers and Voters**

  Counties should provide a centralized telephone hotline for poll workers who need assistance with any issue that comes up on Election Day, including questions about voter languages other than English, voting equipment, how to assist a voter who is not on the voter list, etc. Each polling place needs access to a telephone so poll workers and voters can make these calls. It is the county elections official's responsibility to ensure that all poll workers have some form of communication link to the county elections office on Election Day.

Poll workers should be reminded that if any emergency arises at a polling place, they should contact the county elections office immediately. Poll workers should be instructed to call local law enforcement first if they believe the safety of anyone is in jeopardy.

- **Cards with Contact Information for Voters Who Need More Information**

  Poll workers should be given printed cards that include phone numbers and other contact information (in English and in the jurisdiction's other languages as required by the Voting Rights Act), to give to voters who need more information than the poll workers can provide.

- **Diverse Poll Worker Workforce**

  Counties should broaden and/or continue their poll worker recruitment efforts to ensure a representative group diverse in age, ethnicity, disabilities, and language fluency.

- **Evaluation Tool for Roving Inspectors**

  Roving polling place inspectors should have an evaluation tool (such as a checklist) to ensure every polling place is following the rules regarding voting including, but not limited to, providing assistance to voters with disabilities or language challenges and properly using secrecy sleeves and provisional ballots.

- **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.