

Assistant Chief Education Program – Team Planning

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Team Planning

- Your election official roster is a collection of individuals until you bring them together to work as a team.
- A team is a group with a common goal following a leader who has a plan.
- Team planning includes:
 - Education
 - Communication
 - Role assignments



Team Education

- You may have experience with your team from prior elections – you may know who needs more education and who needs less.
- When the hardware, software, law and or procedures change, everyone will need more education.
- You need to ensure that your team gets the education that they need.



Who Needs What Education?

- New officers of election (often called “newbies”) REQUIRE special education offered before each election. If they cannot attend that offering, they must take the online courses offered by the Virginia Department of Elections (ELECT). Taking both is best.
- Officers of election (EOs) include newbies, EOs as well as Chiefs and Assistants. EOs REQUIRE education on all new systems and procedures in the polling place.
- Specialists are EOs who have been selected by the Chief to receive advanced education. The types of advanced education might include: Provisional/Same Day Registration (SDR) processing, Scanner setup, closeout and unjamming, Poll Pad setup, etc.
- Chiefs and Assistants REQUIRE education before every election on the particulars for that election.
- Additionally, the Chiefs and Assistants should be subject matter experts on all the devices and procedures in the polling place – so make sure among yourselves that you have gotten every updated education course that came along.

Education Communications

- Education communications is an important part of communications planning.
- The Elections Manager will send a general schedule of courses to all EOs before each election.
- The Chief's job is to make sure that every EO on their roster understands what courses they are supposed to attend. And then remind them of it. Maybe again. You should keep track for each EO when they are planning to attend the sessions they need to attend – make sure you have their acknowledgement.
- Chiefs and Assistants should be coordinating their attendance at in-person classes so they can meet up with their team EOs when possible.



Team Assignments

- There are three job assignments you should make for each team member **before** the election, and there may be more you choose to make.
- These key three assignments are:
 - Setup
 - Starting
 - Closeout




Setup Assignment

- Setup assignments are the jobs an EO will perform before the polls open to get some aspect of the polling place ready.
- Setup assignments are often made in groups of 2 or more EOs, e.g., setting up the scanner, the Poll Pads, etc. Some assignments are best managed by a team with a D and an R.
- Setup assignments need to factor in knowledge as well as abilities.
- Ensure that EOs with the same setup assignment know who their partners are.
- Post the setup and starting assignments on the cage in case folks forget what they are supposed to do.
- Consider assigning an Assistant Chief to be part of the scanner team, or if not there, the Poll Pad team.



Setup Assignments

- Setup (and closing) assignments do not match up perfectly with the EO officer positions. For setup, you need teams or individuals responsible for:
 - Poll Pads
 - Cage Photography and Unloading
 - Scanner/ExpressVote
 - Greeter
 - Ballots
 - Marking Booths
 - Signs
 - Provisional/SDR
- Your precinct may have special needs for other teams. 

Starting Assignment

- The starting assignment is the position that an EO starts in for the day. There is more on the nuances of this assignment later in this presentation.
- A starting assignment should, in general, be just that, where an EO starts. In most cases it should not be what they do all day.
 - There are special circumstances where one EO stays in the same job all day, whether due to their preferences, their abilities, their education or other factors as determined by the chief.
 - This should not be the rule – most positions should be rotated through.
 - Even in roles that have a “permanent” assignment, work other EOs into that role if only as helpers to ensure that the experience of performing that role is not only in one EO’s hands.
- In general, EOs like to do different jobs to learn more, to alleviate the boredom, to get to sit or stand, and in general just to have some change in a long day.




Closeout Assignment

- There is a good argument to be made that the team that set something up should be the team that closes something down.
 - They are the most likely to know where everything goes.
 - They know what they did in the morning.
 - Because of these two, they are probably the fastest.
- You can assign changes to the closeout teams (from the setup teams) but you should have a good reason for doing so.



Closeout Assignments

- Just like setup, closing assignments do not match up perfectly with the EO officer positions. For closing, you need teams or individuals that close down, put away, or take care of:
 - Poll Pads
 - Scanner/ExpressVote
 - Cage Loading
 - Greeter
 - Ballots
 - Marking Booths
 - Signs
 - Provisional/SDR
 - Statement of Results (SOR)
- These teams do not take the same amount of time to do their jobs, and the SOR team cannot start until the scanner is shut down. You might assign someone to do EPB closing first, or Greeter space cleanup, and then report for SOR duty, for example.
- Cage Loading cannot start until the scanner is shut down, as it goes in first. 

Choosing the EOs for Polling Place Jobs

- The polling place has a number of distinct roles for EOs, each requires different education, and there are different considerations for each role:
 - Greeter officer
 - Check-in officer
 - Ballot officer
 - Marking booth officer
 - Scanner/Machine officer
 - Provisional/SDR officer



Greeter Officer

- We used to consider this a great job for newbies, because all you had to do was tell folks to get out their ID and direct them to the Poll Pads -- not any more.
- The greeter is managing the flow of voters into the precinct. They are looking not only at the queue for the Poll Pads, but also the queues elsewhere in the polling place and acting as the traffic cop who stops traffic in until the jam clears. Lines of more than a few voters anywhere in the polling place are signs of trouble and the Greeter helps to prevent them to enable the EOs to maintain control in the polling place.
- The greeter is assessing incoming voters trying to identify voters who might need assistance, so that this need can be identified BEFORE the voter gets to the marking booth.
- The greeter is keeping one eye out the door looking for outside poll voters.
- The greeter is also minding the ballot drop box for absentee ballot drop off.
- The greeter is directing voters to the sample ballots so the voters can be prepared for what they are going to get.
- For busy elections, you may have two greeters to do all of the above.
- And the greeter tells voters to get their IDs out and directs them to the Poll Pads.



Check-In Officer

- In addition to knowing how to check in a voter on the Poll Pad, the check-in officer needs to know how to talk to the voters:
 - Voters marked as inactive should not generally be told they are inactive.
 - Voters with issues that may require them to vote provisionally should be passed on to the Chief or Assistant or Provisional specialist without being left with the feeling that they may not get to vote.
 - Voters who are sensitive about answering the “which ballot” question for a dual primary need diplomatic non-partisan soothing responses.
- And, for general elections, the Check-In officer should be *on average* quick at their job.
- It is a good practice to have your best Poll Pad officers as the starting team – sometimes there is a queue when you open the door, and your best team may work out any problems faster than anyone else.



Ballot Officer

- The ballot officer needs to be very meticulous.
- The ballot officer has some manual record keeping responsibilities that other positions do not have: Ballot Record Report, Ballot Tally Sheet, and keeping spoiled ballots.
- The ballot officer has the responsibility for controlling ballots.
- Finding good ballot officers is difficult, because you have to match the temperament needed to do the job with the sunny disposition we would like all officers to have.
- This is often a role which could be done by one officer, but might be better done by two.



Marking Booth Officer

- This is a sit/stand job. While the marking booth officer needs to be standing much of the time, they should have available a chair for the occasional rest.
- The marking booth officer has several key responsibilities:
 - Identify voters who made it this far but should have assistance.
 - Keep idle chatter in the marking booths down.
 - Identify and correct voters who are misusing their phones.
 - Ensure that materials left behind are properly addressed:
 - Sample ballots go in the trash.
 - Keys, glasses, wallets, IDs, etc. go back to the voter if you can catch them or to the Chief for the Lost and Found envelope.
 - On wet days, making sure the marking booths stay dry, in general making sure the surfaces are clean.
- While patrolling the marking booth area, the marking booth officer must give the voters enough space to not feel as though their secret ballot is infringed upon.

Scanner/Machine Officer

- The Scanner officer needs to be prepared to say something like this hundreds of times each day in a cheerful and reasonably loud voice “Please place your ballot on the arrow and slide it into the scanner” followed by “Wait to make sure the screen shows that your ballot has counted” and then “Your ballot has counted, thanks for voting”.
- The scanner officer needs to do this while staying four feet from the scanner.
- If a jam or mis-feed occurs, or the scanner rejects a voter’s ballot, the scanner officer needs to know when they need to instruct the voter as to what to do, and when they themselves need to step in to take direct action in view of the voter.



Provisional/SDR Officer

- This used to be the exclusive domain of Chiefs and Assistants, but with the dramatic rise in provisionals arising from SDRs and absentee ballots not returned, this is increasingly being assigned to an EO.
- There is specialized education needed to do this job.
- It is vital that the officer complete all of the Provisional/SDR documentation correctly and ensure the voter completes their information as well, otherwise the provisional vote may not count and/or the registration may not be valid.
- This officer is likely someone who may need to talk to the registrar's office on their own during the day if so directed by the Chief.



Rotating Officers

- An Assistant Chief may be assigned the task of:
 - Keeping track of who to rotate, who not to rotate, what jobs each EO is suited to, which jobs they will need more help/on-the-job education assistance with.
 - Moving officers during the day to different jobs. You may want to do this in staggered shifts – so maybe all the check-in officers don't leave that job at the same time.
 - Tracking who has worked where, and where they might go next.
- This Assistant Chief will probably have good feedback to offer on EO evaluations.



Overseeing not Overseering

- The Chief needs to maintain oversight of the election – walk around or look around to see how your EOs are doing, and help them if they need it – especially if they do not know they need it.
- Too much overseeing can begin to feel like “overseering” – which might be described as what happens to vegetables under a broiler - do not micromanage EOs who are obviously competent in their jobs.
- However, if EOs are not doing what they should be doing, even with additional guidance, you need to firmly redirect them and possibly reassign them to a job they can do.



Afterword

- Telling your team their assignments in advance contributes to their confidence and success. They will know what they are doing from the time they arrive until the end of the day.
- Ensuring your team is educated properly for their jobs is your job, as is getting the right people in the right jobs.
- Having EOs in jobs that they have the right job skills for will improve their chances for success.

