



Election Defense Alliance, Election Integrity & the Warren Poll

## Local Coordinator Instruction Sheet

### Overview

The Local Coordinator (LC) is responsible for all Election Verification Exit Poll (EVEP) sites within his/her territory. The number of EVEP sites and the size of the LC's territory will be determined by volunteer commitments, geography, and other logistical considerations. Note: The LC will have multiple EVEP sites.

The LC's responsibilities include securing volunteers for EVEP sites, conducting and coordinating training, maintaining communication with EVEP project staff, assisting with local media outreach, managing Election Day activities (including trouble-shooting), overseeing delivery of questionnaires for data entry, ensuring security of questionnaires throughout the day, ensuring the correct end of day protocols are followed, managing (or delegating) the breakdown of the site and reclaiming of materials, overseeing the exit poll tally in a public place, and ensuring that valid, accurate data is communicated to EVEP project staff for analysis on Election Night.

### Instruction Sheet Contents

This instruction sheet is broken into 5 sections:

- Pre-Election Day tasks
- Election Day tasks
- Closing tasks
- Tallying tasks
- After the Election

### Pre-Election Day Tasks

This is a list of the tasks to be completed by the LC prior to Election Day (greater detail is provided in sections immediately below this list).

1. Research possible EVEP Sites
2. Recruit volunteers (including interviewers and data entry people)
3. Secure a local base of operation (optional)
4. Schedule and conduct volunteer training session(s)
5. Obtain a local legal advisor (if possible)
6. Work with EVEP project staff to finalize EVEP sites (details of EVEP sites to be kept secret until November 2).
7. Collect Election Board information
8. Schedule volunteers for specific shifts
9. Put together Election Day kits

## 1. Research possible EVEP Sites

There are a number of factors to consider when researching EVEP sites.

The best EVEP sites have:

- Publicly accessible poll tapes, posted on site during Election Night (with absentee and early voting totals clearly distinguished, separated, or not included)
- A large number of voters and a historical record of high voter turnout
- Only one entrance and exit
- Contested down ballot (local) races and/or ballot initiatives

Additional factors when considering EVEP sites:

- Logistical considerations (travel distance for LC and volunteers, availability of parking, etc.)
- An area available for table placement as close as the law allows yet unobtrusive (the legal distance that interviewers must maintain from the poll entrance differs from state to state)
- Protection from rain or snow? An indoor space is best, but hard to ensure.
- In states with cold/bad weather, being inside the building, at least in the foyer, or in a hallway leading to the voting room, is preferred, if allowed. If outside, then look for an overhang to protect from rain. Lighting also. Clocks will be moved back the weekend before the 2008 election so it will get dark about 5:30 or 6 pm.

Note: While detection and prevention of fraudulent behavior on behalf of election officials and/or vote tabulators is our objective, we want to analyze data from a representative sample of sites – not simply data from sites that are thought to be suspicious (evidence indicates that fraud in 2004 was most extreme and blatant in the most heavily Republican precincts (Freeman & Bleifuss, 2006; Freeman & Mitteldorf, 2005)). Equal distribution of party registration provides more statistical power.

Additionally, we will need to know which precincts are assigned to each EVEP site. There may be *multiple precincts assigned to the same poll site*. You will need to determine the precinct numbers assigned to your site(s), and to determine the number of voters registered in each precinct. This is important!

You can obtain this information from the registrar of voters.

## 2. Recruit volunteers (to be interviewers and data entry people)

Recruitment of volunteers is critical. Volunteers will roughly be asked to work in two capacities:

- Interviewers (day, on site)
- Data entry (night, off-site, public venue)

The LC should immediately conduct volunteer outreach, including:

- Friends, relatives, and colleagues
- Members of sympathetic, civic-minded organizations (peace groups, unions, churches are a good source)
- Local college students
- Additionally, new sign-ups from national media outreach efforts and EVEP project website sign-ups will be provided to the LC by EVEP project staff on a rolling basis.

The size and layout of each EVEP site will determine the ideal number of interviewers, but it is estimated that **1 interviewer for every 200 registered voters** will be required. Again, the site-specific information can be obtained from the registrar of voters.

**The LC will likely need ~4 interviewers at any one time**, and most interviewers will likely work ½ day. This means that approximately 8-10 interviewers will be needed per site on Election Day.

The LC will need to collect volunteer names, cell phone numbers, email addresses, and any location/scheduling preferences.

### 3. **Secure a local base of operation (if you think it is needed)**

A local base can be useful, but not necessary. Larger operations may require a centralized base of operations for training and for Election Day material pick up

### 4. **Schedule and conduct volunteer training session(s)**

The LC will need to provide volunteers with training and protocol for their specific Election Day tasks.

- The LC must first attend a compulsory one-hour conference conducted by one or more EVEP project principals. This call must be scheduled the week of October 20th.
- The LC will be expected to get all his/her recruits trained via one of two conference calls run by us the week prior to the election. Any late-date recruits **MUST** be trained by the LC either face-to-face or by detailed phone instruction. Training is required for every volunteer.
- The LC must emphasize that all volunteers must dress professionally, and not wear anything partisan, including political shirts, buttons or other partisan paraphernalia. Volunteers should be reminded to plan their attire the day before.
- Volunteers must be instructed to prepare for the weather. Check the weather forecast and know what conditions to prepare for on Election Day. Bring appropriate clothing (hats, gloves, and umbrellas), sunscreen and sunglasses, etc. and be prepared to keep paper materials dry and prevent the wind from blowing them away.
- Volunteers should look respectable and approachable. It's important that EVEP volunteers be able to foster a welcoming rapport with the general public, so that we achieve a high rate of participation from voters of all political persuasions.
- The LC should remind volunteers to refrain from partisan conversation in favor of any party throughout their shift.
- The LC may want to identify interviewers whom they feel would reflect particularly well on the effort and direct local media sources to their EVEP sites, but the LC should briefly prepare all interviewers for what to say to newspaper reporters and broadcasters in the event that they are interviewed.

Verification of volunteer training will be reported to EVEP project staff prior to Election Day (including name, contact info). Questions regarding training should be directed to Sally Castleman (781.862.0454) and Ryan Herlinger (215.432.2329).

### 5. **Attempt to obtain a local legal advisor (if possible)**

There may already be an attorney providing pro bono legal counsel to community activists on election matters in your area. If not, try to find one who will agree to volunteer their services. A legal advisor's responsibilities are to:

- At minimum, have familiarity with local, county, and state election codes.

- Be available by phone on the day of the EVEP for advice, and to remind election officials of the law.
- Be available after the EVEP to advise on recounts and possible legal action.

Note: The LC should also bring two copies of the law or directive allowing exit polling.

## 6. Finalize EVEP sites (details to be kept secret until November 2)

The LC and EVEP project staff should come to an agreement on EVEP site selection, based on logistical factors (such as volunteer locations, availability of transportation), site details (precinct partisanship, partisan control, voting technology, site accessibility), and voter socioeconomic demographics. The selected locations should be kept secret to reduce the possibility that election officials or 3<sup>rd</sup> parties would be able to deviate from planned processes on Election Day.

The LC should visit the selected sites to ensure that:

- The LC is 100% certain of the site's location and layout
- The LC knows that there are no serious problems, e.g., voters live in the building and thus never pass by the interviewer.

The LC should also:

- Prepare and distribute a map of the EVEP site (blocking out planned table, interviewer sites), and driving directions for volunteers (Google maps is a good resource) to ensure that volunteers have no difficulty in arriving on time.
- Locate the nearest restrooms. Many polling places will have restrooms, and it's OK to use them. If there are no restrooms at the poll site, locate the nearest ones ahead of time.
- Locate parking. Parking can be a problem at schools, churches, fire stations, etc. Plan a parking strategy for yourself and your fellow volunteers ahead of time to avoid parking problems on Election Day. Cars with political messages on them should not park near the EVEP polling station.

## 7. Collect Election Board information

The LC should attempt to collect information about the Board of Elections that have jurisdiction in their territory. **The EVEP project staff will assist the LC with collection of this data.** The type of information that will be of value:

- Past election results by precinct. This is helpful for both choosing precincts and conducting subsequent analysis.
- A clear indication of the exact precincts that will vote at the polling location (most polling locations have multiple precincts at on place.)
- Most current voter registration list.
- Regulations governing exit pollsters at polling places. For example, what is the law on how far back from polling place exit pollsters have to stand?
- Most current polling place listing with name of building (e.g., Dwight School), and address.
- Map of the polling places or precinct map. Best is if there is a precinct map that also shows the location of the polling places. That is, all in one.
- Hours polling places are open on Election Day.

The LC should introduce themselves to the staff at the Polling location as soon as possible on Election Day in order to establish good working relations with Election Board officials. Information that the LC will want to acquire include:

- How to get official results as soon as possible (hopefully, shortly after the polls close on Election Day) for the precincts that we are polling. Note: Don't forget to work with your legal advisor (if obtained); it might be necessary to contact him/her if the precinct totals are not posted. If this occurs, try to record the refusal and/or explanation on video.
- Names and telephone numbers of election board officials (i.e., Head of the Election Board, Democratic Director of Elections, Republican Director of Elections).
- Names and contact information for other primary contact people at the Election Board.

## 8. Schedule Volunteers for specific shifts

It is critical that the LC create a detailed, concrete Election Day and Election Night schedule. Ideally, each site can have two shifts (but the reality of volunteer availability will result in some shifts being less than ½ day, and some shifts overlapping others).

Volunteers must understand that they are committed to specific times, and are not simply expected to be on site for a few hours in the morning or evening. The LC should also make contingency plans (e.g., backup interviewers) based on the likelihood that some volunteers may be late or not show up at all.

The reliability and validity of all data collected during the EVEP project depends upon strict adherence to protocol.

## 9. Put together Election Day kits

The LC will be provided with 6 documents in electronic format. To reduce shipping costs, the LC will be asked to print this material locally. A TBD level of reimbursement will be provided to select EVEP sites.

The 4 documents include:

- ID badges (to be worn by all volunteers)
- Questionnaires (to be handed out to voters *after* they vote)
- Non-participant tracking sheets
- FAQ handout (to be distributed after submission of questionnaire (if info requested))

The EVEP project staff will also provide (via U.S. mail):

- Plastic badge holders
- Lanyards

The LC will need to work with his/her volunteers to provide the following material for Election Day:

- Clipboards (minimum of 6; for sites with multiple precincts, more than 6 will be needed)
- Pens (bring extra, must write dark and thick, but not leach through paper)
- A Lockbox. **A uniform standard box will be suggested by EVEP project staff** – it must be large enough to hold the anticipated number of questionnaires that the LC's site will receive. If properly staffed, figure 75% of the total number of voters registered at the EVEP site.
- Tables. Preferably use a folding table to have enough space to fit the Lock Box and material.
- A box to store extra supplies under the table
- Two rolls of tape, including:

- 1) clear tape for sealing all openings in the Lock Box and lid (inside and outside surfaces), and
  - 2) masking tape for making a writable seal
- A "Voting Irregularities" manila envelope.
  - A "Non-participant" manila envelope.
  - Chairs. If possible, bring about 2 or 3.
  - Umbrellas. Preferably oversized so that voters can fill out questionnaires while protected from the rain by the interviewer.
  - Flashlights with batteries (it is advisable to set up the EVEP table near a street light, but this may not be possible), and a battery-operated table lantern (if possible).
  - Table Sign saying "Election Verification Exit Poll" to clearly distinguish the EVEP table from the official polling site to avoid confusing voters.
  - Still or video camera. Have a camera or video camera to document certain parts of the EVEP. Record the start and end, and any unusual events during the day. Be sure to video the official precinct tally tape posted at the polling entrance after the poll closes.
  - A video camera to document the various security protocols taken with the Lock Box, beginning at poll site opening and ending with the tallying of the ballots, including:
    - a) beginning of operation with the sealing of the box and signing by first voter;
    - b) end of operation with taping over the slot and signing of the tape;
    - c) the transport of the box;
    - d) the opening of the box;
    - e) ballot counting;
    - f) the start of data entry into computers.
  - Food and water. Consider bringing a cooler with food and water. Remember that you will be there for a few hours, or even all day, and that you may not be able to leave for lunch.
  - Clips, ties, paper weights. Keep the wind from blowing away papers and knocking over signs. Clothespins, binder clips, rubber bands, paperweights, even bungee cords can all come in handy.
  - Cell phones and phone list. Each EVEP Volunteer should have a charged, working phone, and a list of all team phone numbers distributed to every team. Teams must be able to communicate with each other and with the LC (plus the local legal advisors, EVEP project staff, and the EVEP press liaison throughout Election Day.
  - **Reminder: The LC should also bring two copies of the law or directive allowing exit polling.**

# Election Day Tasks

This is an outline of the tasks to be completed on Election Day:

1. Set up the EVEP site
2. Oversee the Election Day EVEP activities

## 1. Set up the EVEP site [no hyphen]

Timely set-up is crucial to a successful EVEP. The following instructions are based heavily on the experience gained in Los Angeles County under the direction of **Judy Alter**. Some of the details will vary depending on state law.

If the LC is coordinating multiple sites, the LC will need to assign one trusted volunteer as a site manager. Either the LC or the site manager will be responsible for the following steps:

- **Measure the legal distance from the poll site entrance.**  
Election codes vary from state to state, but generally prohibit petitioning or soliciting voters within 25-100 feet of a poll site. To avoid the appearance of conflict with the law, conduct all EVEP operations outside this perimeter. A 100-foot construction tape measure is ideal, but use what you have.
- **Meet the poll workers.**  
While two volunteers set up the EVEP table, the LC or one volunteer should go into the official polling site and introduce him/herself to the inspector in each precinct and describe what an EVEP is, and how nonpartisan volunteers are conducting it.
- **Arrange Presentation of EVEP Materials.**
  - 1) Prominently display the EVEP signage – probably tape to the table -- and other material so voters will clearly see them as they approach the EVEP table.
  - 2) Display near the ballot box a list showing the poll site address and the precincts included in the poll site. Ask voters to write the number of their voting precinct on their EVEP ballot if they know it.
  - 3) Clip a set of non-participant tracking sheets on the back of each clipboard, clipped from the side, with one edge of the clip under the stack of questionnaires. Use the clipboard top clip to hold a stack of questionnaires.
  - 4) Place the clipboards in front of the Lock Box. Replace a pile of questionnaire on the clipboards as soon as the stack runs low. Keep the envelope of blank questionnaires by the Lock Box.
  - 5) Place the "Voting Irregularities" envelope and pen near the Lock Box.
  - 6) Stack the voter instruction sheets and informational handouts near the far end of the table or in a small box under the table.
- **Secure the questionnaire Lock Box**  
Ask the first voter to confirm that the Lock Box is empty, then put the lid on the Lock Box, and wrap the masking tape around the entire box on either side of the ballot slot and around the box along the lid edge, completely sealing the lid to the box. Ask the voter to write his or her signature across the tape seal and onto the box (so any breaking of the seal will be detectable). One volunteer also signs across the seal and onto the box, and writes the time and date of EVEP poll opening.
- **Assign Tasks**  
A 5-volunteer team is optimal. 3 to 4 volunteers should be assigned to work as interviewers,

(engaging the voters, answering questions and directing the flow) while 1 volunteer should be assigned to manage materials (putting questionnaires on clipboards, keeping stock of pens and paper, etc). Switch roles periodically to give volunteers cross-training in all tasks and avoid monotony.

- Note: Each interviewer must also keep track of non-participants – those who are approached and choose not to participate. Write the approximate age, gender and race on a tracking sheet on back of the clipboard.
- **Make sure that every volunteer wears his/her badge.**  
All volunteers must be properly identified.

## 2. Oversee Election Day EVEP Activities

The primary responsibility of the LC and the site manager is overseeing the Election Day EVEP effort.

- **Approaching Voters on the way OUT**

Approach voters

Here's a sample pitch:

***"Please take part in the Election Verification Exit Poll. It will only take a few seconds of your time; it's to help verify the accuracy of the official counts. Thanks!"***

Another approach:

***"Hi. Did you just vote?"*** (Sometimes they are leaving the room or building for other reasons. This also gets them saying "yes". If they say "yes," then,

***"We'd like for you to fill out this short exit poll survey."*** (If you say "Would you like to participate in our exit poll?" they can say "no".) While saying this you show them the survey with clipboard and a pen. Then,

***"It will only take 20 seconds."*** Emphasize that you are not working for any candidates or parties, and that it is completely anonymous. If they need more information, hand them the project FAQ handout. ***"It's to help verify the accuracy of the official counts."***

Note: Interviewers should not sit at the EVEP table. They should stand and actively approach people. The aim is to ask EVERY voter. That is why the ideal number is 5 interviewers for each EVEP site.

- **Once a voter has agreed to participate**

Hand them a clipboard with an EVEP questionnaire on it, ask them to please fill out their questionnaire, and once complete fold it in half, and insert it in the EVEP Lock Box.

Preserve the privacy of the EVEP process. Ask voters to step away from the table to fill out their questionnaires. Let voters take their time, even if there is a line. Do not touch any questionnaire after it has been handed to a voter.

If a voter makes a mistake and requests a new questionnaire, ask them to mark it "VOID" and place it in the EVEP questionnaire Lock Box. (These voided questionnaires will be counted later to ensure that every ballot has been accounted for).

The EVEP methodology calls for approaching EVERY voter. No voters are to be ignored.

Reminder: Voters who refuse to participate will be recorded, including sex, race, and approximate age. Each clipboard will have a tracking sheet on the back to record these voters.

- **Trouble-shooting and problem solving**  
The LC may be called upon to deal with volunteer and voter problems throughout the day, including unforeseen process-related or technical EVEP issues, inclement weather, problematic election officials, and/or personnel shortages or personal issues. The LC will work to resolve local EVEP problems on the ground, *but should contact the EVEP staff if issues remain unresolved, or if proper solutions are not readily apparent*. All issues should be recorded throughout the day. Note: **Voting** problems should be directed to non-partisan groups, such as Election Protection ([1-866-OUR-VOTE](tel:1-866-OUR-VOTE)).
- The LC must communicate with EVEP project staff at 2-hour intervals

# Closing Tasks

This is an outline of the tasks to be completed after the official polls have closed on Election Day:

1. Seal and secure questionnaires; break down EVEP site
2. Obtain the official results issued by the Board of Election
3. Transport all material to the tally site

## 1. Seal and secure all material from EVEP site

The LC will need to ensure that the following steps occur as the EVEP sites closes:

- **Seal the EVEP Lock Box.**  
Seal the slot with masking tape; sign across the tape seal and onto the box, and mark the date and time. Ask the last voter to also sign across the tape seal onto the box.
- **Videotape the sealing process.**
- **Count the blank EVEP questionnaires.**  
Do *not* discard any questionnaires. Count and place them in the questionnaires envelope, writing the number of unused questionnaires on the envelope. (Remember that one “blank” questionnaire has been used to record the official poll results). The volunteer counting blank questionnaires should sign the envelope.
- **Secure all blank questionnaires.**  
Place the envelope containing the blank EVEP questionnaires over the slot of the sealed Lock Box and wrap masking tape around the box, and envelope.
- **Pick up and pack away the supplies.**  
Various paper scraps can be gathered for recycling.
- **The Lock Box, questionnaires, and other materials should be transported before the activities in #2 (below) are complete**, i.e., numbers 2 and 3 should be done in parallel. This will expedite the counting process.

## 2. Obtain the official results issued by the Board of Elections

This is a critical step. The LC must ensure that this information is secured.

- **Observe the closing of the official poll site.**  
One EVEP volunteer observes the closing of the poll site and the printing of the precinct tally tapes. If the EVEP site uses scanners, the poll workers are required to print two tapes: one to sign and place in an envelope with the scanner memory card, and another signed copy to post on the polling site door.
- **Record the precinct tally tapes.**  
The EVEP volunteer/observer copies the results shown on the precinct tally tape, writing this information onto a blank EVEP (a convenient form listing all the candidates and ballot issues in the election). In addition to entering the votes cast for each candidate and ballot issue, record the poll location, the precinct number(s) included at the poll, and the total number of ballots cast at the poll. Make a photographic or video record of the official precinct tally tape.
- **Secure the precinct tally tape information.**  
Tuck the written copy of the precinct tally tape between the roster and the questionnaire envelope for safekeeping.

### **3. Transport all material to the tally site**

The LC must ensure that the following steps occur as the EVEP moves from the official location to the tally site:

- A minimum of two volunteers must accompany all material as it is removed from the site and loaded into a vehicle for transportation to the public tally site.
- The material should be locked in the trunk of the vehicle.
- Videotape the locking and the two volunteers.
- Preferably one non-partisan or neutral individual, or a member of the press, should accompany the vehicle during transportation. Depending on length of travel or participation of neutral observers, the LC may consider videotaping the transport of the material.

# Tallying Tasks

This is a list of the tasks to be completed at the tally site.

1. Unseal the Lock Box and remove the questionnaires
2. Count and report the presidential responses
3. Count and report all down-ballot responses
4. Enter the data into computer form (Excel)

## 1. Unseal the Lock Box and remove the questionnaires

- With a video camera recording, Lock Boxes should be unsealed and the questionnaires removed. This should be done in the presence of multiple people, including a member of the public. Videotape the nature of the public surroundings.
- Unfold and stack the questionnaires in preparation for tallying.

## 2. Count and report the presidential responses

- Form teams of 3 to conduct the tally. One person reads the results, and sorts into piles according to candidate chosen, one pile for each possible choice. The other two people observe. Count the piles and record. Have at least one of the others repeat the counting of each pile. If totals match, that becomes the recorded final count. If they do not, team members continue to count the piles until they all agree on the total.
- Write final figures on final tally sheet.
- If possible, add to tally sheet the 'official' number from the poll tape.
- Call the EVEP project staff with the total, and send an email with clear indication of the polling location, precinct number(s), tally totals, and the LC's name and cell phone number.

## 3. Count and report all down-ballot responses

- Repeat the same sorting process followed for the Presidential tally; put the questionnaires into piles according to candidate, ballot issue, or demographic grouping. Tally the piles *for one question at a time*.
- Double check the figures – repeat if figures do not match.
- When totals are agreed on by the team, write onto final tally sheet.
- If you have them, add onto the tally sheet the official poll tape totals.
- Call totals in to the EVEP staff as each non-demographic question is completed.
- Repeat this process, counting the questionnaires for each of the remaining candidates and ballot issues, counting the piles, having a team member re-count each pile, marking on tally sheet and adding official count to tally sheet.
- Record the confirmed total of questionnaires cast in each precinct.
- The LC should contact the EVEP staff with final results. At least three EVEP volunteers should witness the phone call. A follow up email confirming the results should also be sent.

## 4. Enter the data into computer form (Excel)

- As soon as the races have been counted and reported, the questionnaires can be transferred to the set of people who will be entering the data into computers.
- Using the program, form, template and/or spread sheet provided by EVEP staff, complete data from each questionnaire is entered *one questionnaire at a time*.

- If this task is not completed on Election Night (at the public place), then reseal the box with new tape, sign and date. Be sure to videotape the process.
- When counting resumes, the unsealing should be videotaped.
- Store the EVEP questionnaires and tally sheets of the EVEP and official voting results in a safe place if needed for possible legal action in the future.

## After the Election

This is a list of the tasks to be completed by the LC after Election Day.

1. Mail completed questionnaires to EVEP project staff.
2. Be available for the month following the election in order to help track down any discrepancies or apparent errors.

**1. Mail completed questionnaires to EVEP project staff**

The LC will be asked to mail the completed questionnaires to EVEP project staff, or to maintain the records for a period of two years. EVEP project staff will reimburse postage.

**2. The LC must be available for the month following the election in order to help track down any discrepancies or apparent errors**

The LC will be asked to be accessible for the first few weeks after the election.

*Congratulations! You've completed all exit poll tasks, and have done your part for our Democracy! Thank you.*