

ELECTION TRANSPARENCY TIMELINE

Immediately (or November 15 - January)

Identify one volunteer per city or county jurisdiction to be in charge of election transparency.

This person becomes the Vice Chair of Election Transparency. This person should cultivate a close relationship with the party chairman. It is recommended that a party chairman does NOT fill both positions. Get the support of the party chairman for election transparency efforts. The chairman is key, and certain actions can only be taken by the person in this role. Understand what they will or will not support.

Then work to recruit one person to be the Manager of Voter Registration List for cleaning the list. (In a small community, this individual can double as the Vice Chair, but it is ideal for these two to be separate because they are both busy right from the start). The Vice Chair and Manager of Voter Registration List should first call or meet with experts from the regional or state party. This person should first become aware of the laws and deadlines for list cleanup, as well as the state deadlines and best practices for success. Ask if there are any others doing this, and don't be afraid to ask them to mentor the person handling these tasks. What is learned will dictate when it is busy and what are the deadlines for the List Manager.

The Vice Chair should meet directly with the Registrar (or the local person in charge of the voting list and election). The Managers can attend too, and it also would be good for the party chairman to attend this initial meeting. Work to make this meeting friendly and get all people on the same page, if possible. Here are a few specific goals of this meeting:

1. Ask what format (Excel, Word, .CSV, etc.) is best for the list of ineligible voters.
2. Ask what documentation is necessary for removal of ineligible people from the voting list.
3. Ask for a list of what people from what party affiliation they have who are working the polls on the next primary(s) and the next general election day. These are usually very knowledgeable and excited to have help.
4. Get the contact information the office has for them. (The Party Chairman usually must be the one to request this.)
5. If your state has party registration, the chairman should ask for a list of all of the people with your same party affiliation in your city/county/area. This can be used to recruit volunteers.



Based on the details in the above meeting, the timeline below should be adjusted to fit your local deadlines and the personal formatting requests of the office staff.

Keep in mind that larger communities have a full board that oversees every manager position while smaller communities have an individual. The same can be true for the paid government staff. Some are an entire board while other communities have a single individual. Learn your local election system. If you have a local board, recruit individuals with integrity and intelligence to join this board overseeing the election. There is usually a small stipend for board members.

February - March


Recruit the rest of the Managers leadership team (if not already in place). If there are still holes, by March, see if leaders will double up or let the party know those roles will not be covered this year because of lack of interest. It is better to have one volunteer with the right level of responsibilities than to overburden them cause burnout.

If it is a small community, one person can fill several roles. If one person is wearing more than one hat, try to give them jobs that work synergistically on Election Day. This includes Officers of Election for Mail-in and E-day, Manager of Election Day Poll Watchers, Manager of Early In-Person Poll Watchers, and the Manager of Mail-In Ballot Poll Watchers.

When - Burden	Title
(Early - Small)	Local Electoral Board Member(s)
(Both - Medium)	Manager of Election Chiefs, Assistants and Officials for Mail-in (Early and Late) and E-day (E-day obviously)
(Early - Medium)	Manager of Early In-Person Poll Watchers
(Both - Small)	Manager of Mail-In Ballot Poll Watchers
(Early - Varies)	Manager of Voter Registration List
(E-day – put <13 precincts under one person)	Manager of Election Day Poll Watchers

Know when your primary and general elections will be held.





March - April

If you have a hostile Registrar, the Manager of Election Chiefs, Assistants and Officials should build your own list of those willing to serve as a poll worker for Early Voting, Mail-in Voting, and Election Day. Refer to this list for recruitment, and check to make sure no one has been unfairly kicked off the list. (See Sample Poll Volunteer Excel document for an effective list management). Keep contact information for each poll worker, especially a cell phone number, email and mailing address, which is helpful for sending thank you cards later. Excel works very well for this, but if the Manager prefers old-school, index cards can also work well.

Identify any precincts that do not have any poll workers affiliated with your party (election officials handing out the real ballots). Recruiting poll workers to be inside these precincts is the next highest priority after building the Management team. Being a poll worker is a long day (around 14 hours), but the state pays a stipend. Businesses can be required by law in some states to give their staff time off to serve.

If you cannot recruit poll workers, you can use poll watchers instead and split the shift. We recommend 4–5-hour long shifts broken up at these times: 5a-9a-1p-6p-close. One person can fill more than one shift. (Keep track and give awards to most active volunteers.)

The Manager of Early In-Person Poll Watchers should figure out when early voting starts and ends, and from what time to when finished. They should make a list of what shifts need to be covered and then start filling shifts and training people. Since this can be a long, drawn-out process, it can be very helpful to ask people to volunteer for the same time every week, if possible, to reduce the workload on this manager. The key for these volunteers is to check the end-of-day balance and text to the manager, which gets shared to the next volunteer in the morning to compare that to the initial balance of votes cast the next morning to ensure that no ballots were stuffed in overnight. These positions also watch to ensure proper ID is given, no repeat voters return, and one ballot per person.

For the Manager of Mail-In Ballot Poll Watchers, this is fewer shifts but harder to schedule ahead. The head of the election can decide, usually with little notice, when the mail-in ballots will be counted. This requires volunteers who are already trained and have flexible schedules. One of the best places to look is within poll workers who are scheduled for Election Day.



They already have a lot of training and just need details on how to handle the envelope process properly. One of the key roles for this is to make sure that when envelopes are opened, they are immediately counted under the witness of a party poll worker. Once the envelopes have been opened, they should not be stored overnight out of sight of party representatives.

Either the in-person or the mail-in manager should also staff the main election office on election day to ensure all the ballots are received and stored properly.

Training for monitoring early voting and mail-in ballot can be very tricky because there is always a steady stream of shifts needing to be filled. It is best to work ahead and then do a single training over the weekend for all shifts that week, otherwise the manager can fall into spending more time training than it would be to just doing it by himself or herself.

Many good party chairmen are not technologically savvy. The Director of Technology has the smallest role, but this person can be incredibly valuable at answering questions of the election staff as to what is possible and what to look out for. In the weeks leading up to the primary and general, this person can drive by each precinct and see which Wi-Fi signals are available and take screen shots. Then they are to drive by the precincts during the primary to see which Wi-Fi signals are available and take screen shots. This person also is available for the testing of the ballot counting machines in the main office.

May - June

This is the time for the full Management team to start heavily recruiting volunteers and building relationships. Send out an email to the full party contact list (see Sample Recruiting Email). Also make announcements in party events. Do not expect people to sign up from an email or announcement. You will have to personally call 95%+ of people to ask them to volunteer.

Know when early voting or in person voting starts. Build a schedule of what shifts are needed to fill this and then start plugging people in. Some organize this on the wall of an internal room of a party office while others organize online in a shared drive.

Once you have one volunteer scheduled for each precinct, then you can work to recruit two people representing your party at every precinct during the primary and during the general election. Sometimes the second person will not be available until the second



year, which will give you more time to retain the previous volunteers and expand on that base. The reason for at least two people inside each precinct is, if one person is falsely accused by the opposing party, there is someone else from the party to back up their statements in a court of law.

Anyone who enters as a poll watcher, usually must have a signed letter by the party chairman designating them as an official poll watcher of that party. Usually, a poll watcher will not be allowed in unless they have a physical copy of this letter to present to the head poll worker.

The Manager of Mail-In Ballots should create a tally for the number of ballots mailed out each day and the running total. Then compare that tally to the number of ballots received back. If the latter is more than the former, you have instant proof of fraud.

July - August

Continue heavily recruiting volunteers. About 60% of positions should be filled by the end of August. Find the best way to keep in contact with volunteers, this can be by sending them a relevant article or an update once every other week, by email, or text, or other contact (see Sample Reminder Email).

The Vice Chair finds and reserves a location(s) for at least two volunteer trainings. One two weeks prior and the other the weekend before the election. Plan for a two-hour training period to go over the relevant laws (an hour and forty minutes) plus questions (15-20 minutes). Sometimes the state party does online training, which is much easier, but does not encourage and build community as much. However, especially for smaller communities, online training is much easier. You must communicate when and where of this training to volunteers as soon as possible.

As campaign volunteers start going door-to-door for voter persuasion, make sure there is a system of reporting, so that if they run into an empty lot with a voter registered to a non-existing address (or 20 people registered to a 900 sq.ft. house), they know how to let the List Manager know about it. This system of reporting MUST be fast and easy. (I recommend the list manager providing printouts for the campaign to give to each volunteer with instructions and contact information). Don't be surprised if the campaign does not make this a high priority. Usually lists cannot be updated during the campaigning season, so it does not benefit them to clean up the list. This is one of many reasons for an organized party effort. Make it easy for the campaign to work with you.





Recognize that they are doing you a favor that will only help the campaign after theirs.

September - October

Set up a phone tree for if there is a problem. A volunteer should first contact their manager, and if it cannot be resolved at that level or will affect the outcome of votes, it should be escalated to the Vice Chair, and after that to the Chair. All of these numbers should be shared with volunteers. In cases when the Chair is less interested, most issues can be escalated from Vice Chair to state expert, but I recommend keeping the Chair in the loop. If legal action needs to be taken, the Chair is the only one that can file a lawsuit on behalf of the local party.

If a sufficient answer is not reached, cultivate the contact information of state election experts, including what should be the party legal counsel (do not share the expert attorney's number with the whole party). It is usually one overworked lawyer volunteering for the whole state, so only bother them with high level legal questions.


Please urge people to use texting whenever possible during the 72 hours up to the end of the election day. For a town of 70,000, before setting up the manager level positions, one vice chair received more than 1,000 texts in one day. The managers help relieve this burden and make sure important things don't fall through the cracks.

Understand that most volunteers need to be trained to recognize what is and isn't a serious problem. This can be best done by running through a list of cases of when to, or not to call a manager.

Keep in mind that after October 15-20, it becomes much harder to recruit volunteers during work hours because most employees are required to give two weeks' notice for any time off requests.

Spend this time shifting from recruiting to training employees. If you still have major holes at this point, use a system of triage to pick the precincts where fraud is most likely and redirect volunteers to fully cover those precincts. I believe it is better to cover one precinct from open to close than two precincts on and off. The reason for this is each volunteer can share the total number of votes with the next volunteer, and by the end of the day, that number can be compared to the official vote total to ensure additional ballots are not run through the system after hours.





Help train your volunteers to understand what is important and what isn't because for many, this is not intuitive. Create an escalation chart for problems (volunteer goes to Precinct Chair, if not resolved, the Vice Chair should encourage everyone to use texts as much as possible on Election Day).

Keep in touch with volunteers, so they do not forget when Election Day is. If possible, plan a simple victory location for people to gather. Keep in mind that some volunteers on the closing shift might have a VERY late night. Depending on your law, you might need to have a few people who can pull an all-nighter to monitor the conclusion and be available for problem areas. However, they will usually not allow new volunteers to enter the precinct after they have closed to count the ballots.

November

The Director of Technology should again test Wi-Fi signals and the ballot machines in the main office.

Urge your volunteers, once fully finished with the precinct tally, to have one person from your party either drive (if a poll worker) or follow behind the car with the ballots (if a poll watcher) to ensure that the right ballots arrive and are passed along to the proper person.

On Election night, the total number of ballots cast and the candidate tallies should be separately communicated to the Vice Chair of Election Transparency for comparison to the official election night numbers, so extra votes cannot be added on the way to the main office.

Depending on state law, some allow mail-in ballots AFTER Election Day. There may need to be a handful of volunteers available after the election to monitor this process as well.