EAC Clearinghouse Award Submission
Category: Outstanding Innovations in Elections
Wake County Board of Elections

Written by the staff at the Wake County Board of Elections
**1200 N. New Hope Rd., Raleigh, NC 27610**

Introduction

Wake County, North Carolina is home to more than 822,000 registered voters. During the 2022 General Election, 454,488 voters casted their ballot in Wake County, with over 415,721 casting their ballot in-person on Election Day or during the seventeen-day Early Voting period. With 212 Election Day precincts and 15 Early Voting locations, it takes thousands of Election Officials to conduct a successful election in Wake County.

As a team, we are always looking for ways to make our training more interactive and engaging for our Officials. Each election, we strive to find better ways to reinforce knowledge, boost participation, and keep our Officials informed on their roles for Early Voting and Election Day. We currently offer in-person classes with hands-on opportunities, Zoom classes, and self-paced modules. Although we offer various options, some challenges we still face are:

- Enhancing what we are already offering both in-person and online
- Choosing enhancements that would satisfy our goals and be beneficial to Officials
- Promoting innovations in our training to get "buy-in" from Officials

After every election we send a post-election survey to Officials to find out how our training could improve and ask for suggestions. We then use that feedback to determine which area of our current program needs the most attention. By reviewing feedback from our Officials, we determined our self-paced online and Zoom classes would be our focus.

When Officials take these online courses, they read the printed material along with the instructions on screen. This does not have the same impact as an in-person instructor led training where they are using the printed materials for exercises, scenario questions, and role-playing. We want our online training to be just as engaging and helpful as the in-person training. This led us to researching interactive manuals.
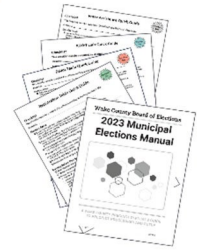
Implementation

Before deciding on a platform, we determined we wanted our interactive manual to:

- Link to videos, websites, photos, and forms
- Have the capability to zoom in on photos
- Keep Officials engaged as they read
- Provide a unique experience that enhances learning
- Be user-friendly

Using the list, we narrowed our search to a platform that was simple to navigate and included all the features we wanted. An interactive manual was produced for each printed manual we provide. What we discovered is our manuals became fun to read, provided increased functionality for our online users, and reinforced their knowledge.

Navigability
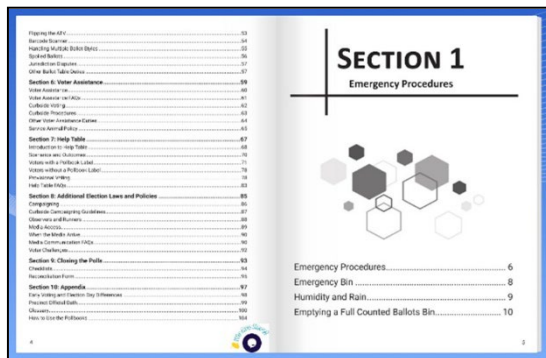
The new interactivity of the manuals gave our readers an opportunity to turn pages by pulling the corner down with their mouse, like a book, or use arrows to navigate through sections. Hyperlinks were used to allow users to jump to specific pages from the main and section table of contents. Links were also added throughout each section to allow users to return to the section table of contents. Users could also choose to use a slide bar at the bottom of the page or a sidebar menu to navigate through the manual. These options made our material extremely user-friendly no matter what type of device the user had.

Accessibility

The interactive manuals are web based. Users can access them from any web browser or device. Users can zoom in on text, photographs, and increase font size as they read. These functions allowed users to get a closer look at diagrams, forms, and images throughout the manual.

Connecting Material

The biggest feature is the ability to connect our print materials to our other content. Hyperlinks connected printed instructions to live action or animated videos. Users could read instructions for a scenario, then click a link to watch a video right from their manual. We also used this feature to link to images of forms so users could see the form each time it was referenced. This function matched how we presented in-person, where readers would receive the instructions orally and on-screen, then watch a video or see an image of the form.


Ease of Use

Animated icons notified users of interactive points. We repeated icons for each type of interaction throughout the material so users would recognize them. Users also had capability to search using keywords. Along with the navigation options listed above, users had no issues using the flipbook on their computer or mobile device.

Unique Features

At the end of every section, we included a live chat feature for users to ask questions about what they had read or get help using the manual. The chat feature was monitored by staff during business hours. Chats submitted after hours became email tickets staff could respond to on the following day.

Sound files could be added to images or text. For example, in one section we provided an icon of a barcode scanner. Once the barcode scanner icon was clicked, you could hear the actual sound the barcode would make. Again, this replicates what we do in person.
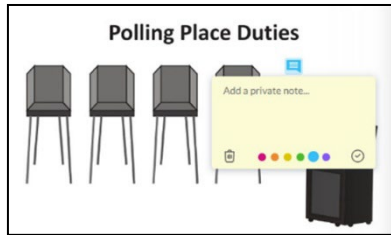
Just like a printed book, users could add notes to pages and customize them by color. Users also had the capability to download the manuals as a pdf or print.

Promoting Enhancements

Once we fully developed the interactive manual, we next determined how to promote it. This started with a live "teaser" demonstration on our monthly Zoom Talk Show "Coffee with Nick." We added links to the manuals on our Precinct Official blog and included them in emails to Officials.

In place of mailing hard copies of materials, we linked our interactive manuals and pdf copies of printed materials in our online modules. During Zoom classes, we instructed Officials to use those online resources to follow along. Users would have the electronic versions of materials in front of them, just as they would have printed copies in an in-person class.

Additionally, we continued to mention the interactive manuals in training updates, emails and in our in-person classes. We made the interactive manuals a resource as valuable, helpful, and available as their printed materials.

Finally, we gave our Chief Judges permission to use their smart phones on Election Day to reference the interactive manuals. Doing this allowed Chief Judges to quickly find instructions or view a video by searching online.

Results
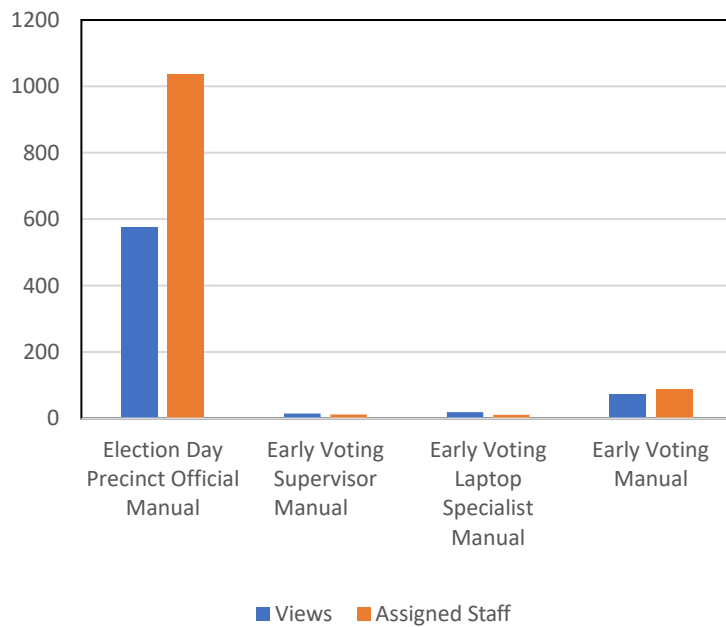
The interactive manuals were launched for the 2023 Municipal Elections. We had a total of 1037 assigned Precinct Officials for Election Day and 577 views of our interactive manual. Early Voting has three types of manuals, and for each one we had the same result. The total views amounted to over half the number of assigned Officials.

The results were impressive for the first year of implementation. We found many Officials liked the combination of using both the print and electronic versions of materials. They loved the creativity, accessibility, and interactive features of our new manuals. Many offered suggestions of how we could increase functionality for future versions. Overall, the launch of these manuals was a huge success and greatly enhanced our existing training options. Officials found the manuals beneficial and as close as they could get to being in an in-person class.

EAC Clearinghouse Award Criteria

Innovation

- Interactive manuals are very new to elections training. Historically, Officials received printed materials and possibly some hands-on training. Utilizing electronic interactive manuals allowed Officials to have the information they needed right at their fingertips. It created instant access to review and re-present information as needed.

Sustainability

- Due to the positive results from the past election, we plan to make an interactive version of our manuals for every election going forward.

- With the platform we chose, updating the manuals will consist of uploading a new version of the material. The previous interactions are saved and copied over to the new manual with very little time and effort. This will allow our team to spend more time on creating new interactions.

- By expanding this idea to our other print materials, we will be able to further develop and apply interactions to our Quick Guides, Flow Charts, and forms.

Outreach efforts

- Beyond Precinct Official training, the interactive manuals can be a tool for educating the public on election procedures. The video link capability can show voters what to expect when they go to vote.

- By understanding the procedures Election Officials must follow, voters will be more prepared for voting and more educated on the overall voting process.

- One of the features of the manuals is that they can be shared to social media via built in links for Facebook, LinkedIn, Twitter or email. It also contains a QR code that can be scanned.

Cost-effectiveness:

- Due to the number of manuals we wanted to make interactive, we choose a paid platform, however pricing is based on what customization features you choose.

- Now that we have this product, we are looking to expand what we do with it as we move into future training.

- There are a range of options for similar products from one-time use to monthly subscriptions.

- A similar offering could be created using resources that most jurisdictions already have, such as Microsoft Office Suite and Adobe DC.

- As we move forward with interactive manuals, we anticipate fewer Officials to request hard copies of materials mailed to them, which will decrease costs.

Replicability

- Other election jurisdictions can easily replicate using interactive manuals. There are many platforms that can be used as templates for creating your own interactive manual using resources you already have.

- The sky is the limit on how much interaction you want to apply to your documents. No special skills or expertise is needed.

Generating Positive Results

- Using interactive manuals greatly enhanced our online trainings.
  - It helped users become more familiar with the rest of our online resources.
  - Users were able to easily connect print materials to photos, videos, web resources, and forms.
  - Creating the interactions provided a new creative outlet for staff to enhance and redesign training options.

- Officials now have the power in their hands to access their manuals and search instantly. When dealing with a scenario in the moment, they can now find the answer and serve our voters faster than flipping through a hard copy.

- When an Official doesn't understand instructions, they can now view any connected images or videos on the spot. Additionally, they can access us live to ask those questions via our chat feature.

Conclusion

Improving our training is a continuous goal for our team. Ensuring our online options are interactive and engaging for our Officials is crucial to their understanding and retention of the material. In order to provide the best online options possible, we had to: 1) enhance what we currently offer with new and exciting options for reading printed material online and engaging in online classes; 2) choose the right enhancements that would satisfy our goals and be beneficial to Officials; 3) effectively promote our innovations to training so Officials would know what is available and how to utilize the tools to reap the most benefit.

Initially, we wanted our Officials to have a new way to engage with their materials online. The more we work with the interactive manuals, the more potential we see in their use for creating interactive forms, workbooks, and flow charts. As we move further into an "online world," having options for fully interactive, engaging online material will be what keeps our training program on the forefront of election specific training in North Carolina and across the country.