

Election Observer Training Handbook

In this Training Handbook you will learn:

- What is required for you to be an Election Observer
- Various election-related venues and activities to which Observers are assigned
- General Rules of Conduct Observers must follow
- How to differentiate between Critical and Non-Critical Incidents you might observe and how to report on each

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Part I: County and City Elections Processes

County Elections:

County election early (mail-in) ballots are printed by Runbeck Election Services, Inc., and delivered to the Cherrybell Post Office in Tucson. Early ballots are then mailed to all early voters. Completed mail-in ballots are delivered to the Recorder's Office Early Ballot Processing Center (EBPC). Once EBPC processes are complete, the Early ballots are delivered to Pima County Elections Department for pre-tabulation preparation and processing, followed by tabulation of votes. Ballots cast at the Polls on Election Day are also delivered to the Pima County Elections Department for tabulation.

City Elections:

City Clerk's Office conducts City elections and is responsible for printing the ballots, assembling, and mailing the outbound ballots, receiving the voted ballots, preparing those ballots for signature verification, transporting ballots to from the EBPC, and processing ballot through tabulation of votes. Starting in the May 2023 Election the City contracted with Runbeck Election Services to perform the same functions (see above) they do for the County. The County performs two functions for City Elections:

1. Receive Military ballots for the City.
2. Perform signature verification services.

When City and County Elections are conducted simultaneously:

When a County election is conducted at the same time as a City election, the City ballots will be processed in a separate room and will carry a red stripe on the top left corner of the affidavit envelope. Staff will be trained to make sure the City and County ballots are kept separate.

A note about the contents of this Handbook:

Since election processes are consistent for both City and County elections, this Handbook will focus on County Election situations and process examples.

Part II: Election Observer

Requirements:

An Election Observer is someone who has been designated by the Chair of one of the political parties recognized in either the State of Arizona or in Pima County to be an official observer on behalf of that political party. The designation must be in writing and signed by the Chair of the Party on the official Party letterhead. A copy of the designation must be sent to the Pima County Recorder's Office in advance of an Observer's arrival at the assigned venue. A copy of the designation is also delivered to the Observer who must present it to the location Supervisor or Voting Center Inspector upon arrival. An Election Observer cannot be a candidate for office.

Political Party Observers are permitted during elections per Arizona Revised Statutes (A.R.S.) 16-590(C).

Election Observer should complete the self-paced test and return a completed, signed test Form to the Pima County Republican Party (PCRP) prior to the Election Observer assignment.

Abilities:

1. Observers should have adequate vision and hearing capabilities as they may be positioned up to 30 feet from the action.
2. Observers should have the ability to sit or stand comfortably for periods of time. (Observing signature verification activities, for instance, might require that the Observer be on his/her feet moving around the room or standing and watching for a period of time.)
3. Observers should be available for a specific stated amount of time (which is typically a 4-hour shift.)
4. Observers should be able to devote 100% of their attention to the assignment. (No phone calls, texting, or tasks unrelated to the job at hand.)

Assignments:

Early Ballot Processing Center (EBPC)*	Elections Department	Voting Centers
<ul style="list-style-type: none">• Early Ballot prep for Signature Verification• Signature Verification• Curing Ballots	<ul style="list-style-type: none">• Early Ballot prep for Tabulation• Adjudication	<ul style="list-style-type: none">• Election Day Voting

*Detailed procedural documents from Pima County Recorder's office are listed in Section VI of this Handbook. Observers can request these documents from PCRP for review and reference.

General Rules Observers must follow

- Arrive at assigned Observer location 10 minutes before shift begins
- No weapons of any kind allowed in assigned Observer location
- No cellphone use allowed in assigned Observer location
- No handling of ballots at any time
- Do not venture into rooms/spaces beyond Observer assignment area
- Do not speak with Election workers or interfere with their efforts
- Only speak with the Supervisor (EBPC) or Inspector (Voting Center)

Part III: Early Ballot Processing

Securing the Early Ballot in the Early Ballot Processing Center (EBPC)

Whether voting early by mail or at an early voting location, the destination for completed ballots is the Pima County Recorder's Office Early Ballot Processing Center (EBPC).

The EBPC is used to **make certain that each early or mailed ballot is in proper form, does not show any indication of having been tampered with and that the signature on the early ballot affidavit belongs to the registered voter who requested the ballot.** EBPC services are used for Special and General Elections at City, County, and Federal levels.

During election cycles all employees of the Pima County Recorder's Office are required to wear an official Recorder's Office lanyard along with their official county identification at all times. The lanyards are color coded based on the employee's political party affiliation. A quick glance at the lanyards will show that the employees performing each task have different political party affiliations without the need to ask for party affiliation.

One security rule in place at all times in every Pima County Recorder's Office facility is that ballots may only be handled and processed when there are two or more employees present who are registered to vote with different political party affiliations (a.k.a. the two person/two party rule.)

About Early Ballot Processing and Tabulation

Upon arrival at EBPC, the **bar code** appearing on an Affidavit Envelope is scanned to update that Voter's Registration history with a digital copy of the Affidavit and to indicate the ballot has been received. The early in person voter is provided with information to help him/her track the status of that ballot.

The **signature** appearing on an Affidavit Envelope is verified manually by an Election Worker who compares that signature to one or more electronic signatures on file for the voter. The Election worker will accept or reject the signature based on comparison. If rejected, County Recorder “Checkers” will attempt to contact the voter so that he/she can correct or confirm the signature. This process is called “**curing**” the ballot.

Once Early Ballots have been through this process, **ballots are turned over to the Elections Department** and are prepared for tabulation. The process involves a 2-person team working with a sealed bin containing sealed, returned, signature-verified ballots inside of Affidavit Envelopes. Once brought to the worktable (a.k.a. Ballot Board), the team will check for signature presence, check off the voter's name on the Poll List, open the envelope to check for a ballot, take the ballot out, inspect the ballot to see if it will go through the Tabulation machine, then put the stack of ballots in a storage box that will be sealed. The affidavit envelopes go into a separate container to be stored in a vault.

Irregularities the team checks for might be an empty envelope or a ballot that can't be read by the tabulation machine due to wrinkled paper or some other physical issue. If it is determined that the ballot is not readable by the tabulation machine the ballot goes to the **Adjudication** room where it is assigned to two workers from opposite parties to create a duplicate ballot on the ExpressVote Machine. They work together to ensure that all votes on the original ballot are accurately transferred. The original ballot is spoiled and included with the new ballot in the bin. The team notes these actions on the Poll List.

What you should watch for as an EBPC Facility Observer:

In all situations	<ul style="list-style-type: none"> Note whether or not there is equal political party affiliations supporting the task. (2 Worker/2 Party Rule)
Initial processing of received ballots	<ul style="list-style-type: none"> Observe ballots that have been placed in the problem tray. Focus on those rejected ballots to see if assessment is correct, such as does the ballot lack a signature on the affidavit envelope, or have signs of tampering or damage.
Ballot Signature Verification	<ul style="list-style-type: none"> Observe each signature verification worker for a period of time to confirm that worker is taking enough time to review signatures and is making good decisions on approved signatures. Observe which signature verifiers are moving quickly and appear to be approving a higher volume of signatures than other workers.

	<ul style="list-style-type: none"> Bring to the attention of the Supervisor any questionable approval of a ballot signature, and if appropriate, document your observations in an incident report.
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Ballot Curing	<ul style="list-style-type: none"> Find location(s) where you can listen to worker phone interaction with voters whose ballots have been rejected. Confirm that the worker provides clear and consistent information on what a voter must do to correct his/her ballot. Confirm that equal priority and effort is given to all rejected ballots regardless of party or other distinction. Any conversations or behaviors that do not align with those described in this section should be brought up with the Supervisor, and if appropriate, documented in an incident report.
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What should you watch for as an Elections Department Observer:

In all situations	<ul style="list-style-type: none"> Note whether or not there is equal political party affiliations supporting the task. (2 Worker/2 Party Rule) Confirm that ballot envelopes are being handled appropriately. Listen for conversations that are political and/or outside of the scope of work being performed.
Ballot Board	<ul style="list-style-type: none"> Watch each team of workers to confirm they are taking adequate time to complete each task: Checking for voter signature on affidavit envelope, checking off name on Poll list, opening envelope and inspecting the ballot.
Adjudication	<ul style="list-style-type: none"> Watch each team of workers for a period of time to confirm that each is accurately transferring votes from the damaged or unreadable original ballot onto a duplicate ballot. Confirm that workers are properly accounting for ballots when moving ballots in and out of designated bins, and into the adjudication area. Questionable calls on ballots should be brought to the Supervisor's attention, and if appropriate, also documented in an incident report.

Part IV: Election Observer Assignments on Election Day

Observers are needed at In-person Voting Centers on Election Day:

- When Voting Center is set up and opened for business
- During regular voting hours
- When Voting Center is closed for the day and ballot box is sealed for transport
- During transportation of ballots to the Elections department for tabulation

About Election Day In-Person Voting

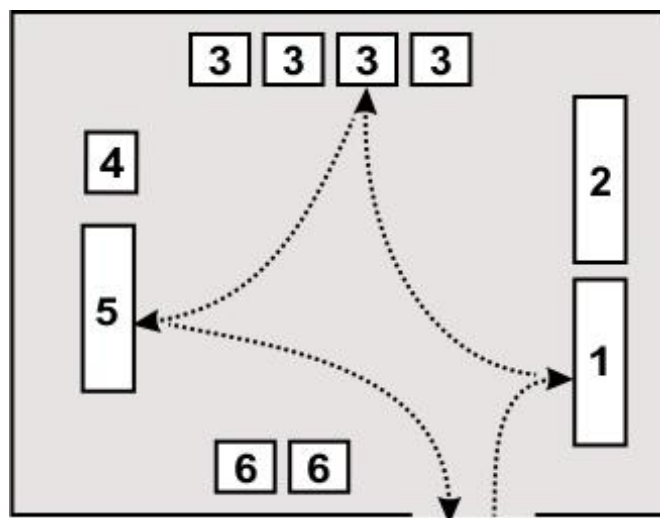
In 2022 Pima County established Voting Centers for Election Day use during Primary and General Elections. An Observer at a Voting Center will be seated in a location where all activities can be seen (and hopefully check-in and ballot drop conversations can be heard.)

An example of Voting Center layout looks like the diagram that follows. The voter enters the facility and stops at the Check In Table to verify ID and receive his/her ballot. If there is an issue with the voter's registration (be it an address, or ID issue for instance) the voter will be sent to the Special Situation table for resolution. With ballot in hand, the voter proceeds to one of several open booths for voting. Once the ballot has been completed, the voter inserts it into the ballot box and exits the Center.

On Election Day, you may also observe voters dropping off their early (mail in) ballots. These are sometimes referred to as "Late Earlyies" as the ballot must still go through the Early Ballot Processing Center before that vote can be counted. This process may be completed several days after Election Day.

This diagram shows the most typical path of a voter in the Voting Center. Observers should be seated in a location that provides visibility to all areas of the Center but does not interfere with voter activities.

- 1: Voter Check-in Table
- 2: Special Situation Table
- 3: Voting Booths
- 4: Accessible Voting Booth
- 5: Ballot Box
- 6: Observers



Rules Election Day Observers must follow

- Observers may only speak with the Inspector. Observers are not allowed speak with any other Voting Center employees, even if one or more speaks to them.
- No electioneering allowed. (This would include wearing garments, hats, pins, or other items that might suggest party affiliation or a political message.)
- Observers may hand-write notes; however, they should not carry or use black or blue ink pens (These two ink colors are reserved for voter ballots only.)
- Observers must keep their distance from the voting booth area to avoid interfering with voter privacy or the voting process.
- Observers must wear a nametag at all times.

What you should watch for during Voting Center Set-up

- Polls not opening on time (6:00 am). Note exact time when Poll opens.
- Confirm that Voting Center equipment and printers are functioning.
- Confirm that required signs are posted outside.
- Confirm that a sample ballot is posted in view of Voters.

What should you watch for during regular Voting Center hours:

- Persons entering the Voting Center who are disruptive or display violent behavior.
- A significant number of voters who have difficulty with check-in or are unable to vote (note reasons if evident.)
- Voters delivering multiple early ballots.
- Poll Workers who appear confused or seem to be misleading voters about process.
- Ballot boxes that are set aside or in some way handled differently.
- Voter Intimidation or other unlawful conduct at the polls.
- Election officials who misdirect you regarding who you can speak to and/or the location where you can observe.
- What types of assistance are needed by/provided to voters.
- Listen to all instructions given by the Inspector.

What you should watch for during Voting Center Close & Ballot Transport:

- Polls not closing on time (7:00 pm or when last voter in line has voted.)
Note exact time when poll closes.
- Poll Workers who aren't following the close-out processes properly.
- Observe final tally of what the pollbook and ballot count logs specify, and discrepancies resolved.
- Observe counting of the variety of ballots (e.g., spoiled ballots, provisional, etc.)
- Confirm that Provisional, Conditional Provisional, and Early Ballots are placed into the proper envelopes and sealed, and quantity recorded.
- Confirm that the Inspector double-checks the number of ballots.
- Confirm that seals have been placed on the Metal Ballot Box prior to transportation, and on the Official Envelope.
- Confirm that the Marshal and Inspector take the Metal Ballot Box with ballots, and the envelopes and voting equipment to the Receiving station. Observer may follow in their own vehicle to ensure chain of custody is not broken.

Part V: Incidents

Observed anomalies to the process, a.k.a **Incidents**, are either **Critical** or **Non-critical**. The Election Observer should document both using an Incident Reporting Form like the one found in this Handbook. **General Observations** that could provide important intelligence to PCRCP for future elections require no reporting form and can be sent to PCRCP in the body of an email.

Examples of Critical Incidents you might observe:

- Violence / Security Threat e.g., violence, bomb threats, hostile displays of weapon (immediately call 911 and the HOTLINE)
- Voting Center closed / unable to open (immediately call the HOTLINE)
- Voting Center opens late
- Voter Intimidation; Electioneering within 75 feet from Voting Center
- Ballot Box Stuffing
- Ballot Stealing or Harvesting
- Vote Buying
- Wrong paper ballots supplied to Voting Center
- Voting Center stays open late e.g., not voters in line at 7pm
- If voters are being turned away
- Observer not allowed to watch opening or closing
- Overt voter suppression
- Poll Worker/Election Official signals who to vote for or not vote for
- Voting Center runs out of ballots
- Voting Center missing equipment and/or supplies
- Voting Center equipment failure/malfunction
- Law Enforcement is notified or arrives on site
- Paper ballots misprinted/wrong races
- Refusal by Inspector to accept observer credential
- Voting lines consistently or significantly exceed 30 minutes

Action: Call the Republican Critical Incident Hotline Number provided in your assignment packet. Next, document details on the Incident Reporting Form and forward to Pima County Republican Headquarters via email or USPS within five days following completion of your Election Observer assignment.

Examples of Non-Critical Incidents you might observe:

- Poll worker error/failure to follow the law (and Inspector fails to remedy)
- Inability for poll workers to receive sufficient/timely troubleshooter support
- Non-English speakers do not receive effective assistance/access
- Repeated use of voting assistance by Poll worker
- Disabled voters not receiving effective assistance
- Coordinated/aggressive party efforts to target voters upon arrival at polling location
- Presence of US Department of Justice or other non-party observers
- Signature verification workers accepting questionable signatures or rushing signature review

Action: Document details on the Incident Reporting Form and forward to Pima County Republican Headquarters via email or USPS within five days following completion of your Election Observer assignment.

Examples of General Observations you might want to report:

- Number of voters who choose to spoil their early ballots to vote on Election Day
- High traffic times for your location
- Minor changes at voting location (substitution of equipment or personnel)
- Presence/absence of party observers
- Poll worker absenteeism

Action: Submit observations/comments to Pima County Republican Headquarters via email or USPS within five days following completion of your Election Observer assignment.

INCIDENT REPORT

Procedures for Incidents: Identify type of incident, complete form below. If incident is identified as critical follow the additional procedures below as applicable. Submit all Incident Report Forms to Pima County Republican Headquarters (hq@pimagop.org) as soon as possible, but no later than 5 days after incident.

For Critical Incidents

- 1) Inform an Election Official and/or Law Enforcement if needed.
If you are in immediate danger, call 911 first.
- 2) Call the Republican Critical Incident Hotline at: 520-321-1492
- 3) Complete form below, providing as much detail as possible.

	<input type="checkbox"/> Critical Incident	<input type="checkbox"/> Non-Critical Incident
Date/Time		
Location:		
What process was being conducted?		
Description of incident		
Name or detailed description of person(s) involved. (Gender, race, hair color, height, weight, clothing, etc.)		
Est. number of ballots Involved		
Other Information		

Observer Printed Name

Observer Signature

Observer Phone Number

Part VI: References

Pima County Recorder's Office Procedures for Elections

- Courier Instructions
- Early Ballot Processing
- Primary Ballot Receiving
- Primary Election Courier Instructions
- Early Ballot Processing Center Visitor and Observer
- Ballot Receiving and opening Instruction
- Ballot Scanning Instructions
- Ballot Processing Center Housekeeping and Disinfecting Instructions
- Security Procedures and Operation Rules at the Early Ballot Processing Center
- Signature Verification Procedures
- Receiving and Inventory Procedures for Ballots Transferred from the Walk In Early Voting Sites to the Ballot Processing Center
- Early Ballot Processing Center Visitor and Observer Rules