Template for Voting Events

PB **[insert Process Name/City/District]**

Thank you for contributing your time and energy to this critical phase of **[insert City name]** inaugural PB process! The voting phase represents the culmination of months of hard work toward the end of building stronger communities, more transparent government, and greater civic engagement. Without you, this exciting and crucial phase of PB would not be possible.

Goals

- Bring together the community to celebrate the hard work done through PB.

- Educate community members about PB, the community, and its needs.

- Help voters make informed choices about which projects to select.

- Collect votes to determine which projects will be funded!

Materials

Voting:

- Paper ballots

- Paper surveys

- Voting flyers

Registration:

- Computers for registration table (4 ideally)

- Voter oaths

- Voter information sheets (in case computer doesn't work)

Volunteers:

- Sign-in sheets for volunteers

- "Quick Guide to the Vote"

Signs:

- Outdoor signage to attract voters and passers-by

- "Vote Here" and direction signs to indicate registration table & voting area

Miscellaneous:

- Pens (several boxes)

- Extension cords

- Wireless hotspots

- Tape

- 2 boxes for ballots and surveys

- Envelopes to store ballots and surveys after the event

- Tables and chairs for the welcome table, voter registration table, and voting area

Staffing

Main voting events should have a minimum of 6 people on hand for the event to run smoothly:

- 1-2 volunteers to stand outside the voting site and direct people in to vote

- 1 volunteer to welcome community members, explain PB, and explain the voting process

- 2-3 volunteers to staff the voting table, to check IDs and hand out and collect ballots and surveys

- 1 volunteer to monitor and assist voters at the voting area

- 1-2 City Staff to oversee the event and troubleshoot

- Optional: 1 person to staff a ballot collection table, to reduce strain on voting table

Set-up (At least an hour before start time)

- **Signs:** Outside the venue, post signs or posters to attract the attention of voters and passers-by.

- **Welcome Table:** Inside the entrance, set up a Welcome Table with PB brochures and voting flyers. Set up an additional table for any other materials from the **[insert City name]** City Council or community groups.

- **Refreshments:** At the side or back of the room, set up a table for refreshments.

- *Registration Table and Voting Area:* On the other side of the main room, or in another room:

  ◦ 1 table for voting volunteers, with ballots, pens, voter surveys, instructions for voting area workers, computer(s) with registration spreadsheet pulled up, Wi-Fi hotspot, if necessary, address list or online look-up tool, and 2 boxes to collect ballots and surveys

  ◦ Optional: if you have more than 2 volunteers for the voting area, consider setting up a separate table for ballot and survey collection boxes.

- **Volunteer Preparation:** Review the instructions in this document. Ask City staff members, Steering Committee members, or voting event coordinators any questions you may have.

Instructions for Voting Stations

Welcome Table

1. **Welcome community members** - Ask them if they already know how participatory budgeting works. If not, give them a brief explanation of the process:

   - Through Participatory Budgeting, the City is giving community members the power to decide how to spend at least $**[insert dollar amount]** of city funds.

   - This money can be used for capital projects, which means physical "brick and mortar" infrastructure and programs and services.

   - Last summer, we held Neighborhood Assemblies where community members brainstormed ideas for how the money should be used.

   - Since then, volunteer Budget Delegates have been meeting to develop these ideas into project proposals. They've worked with the staff and city agencies to make sure the projects meet the City's legal and technical requirements.

   - Now you get to vote on which projects to fund! You will be able to vote for **[# of projects]** different projects. The projects that get the most votes – until the $**[insert dollar amount]** runs out – will be submitted to the city for implementation.

2. **Direct eligible voters to the registration table and/or to proposal displays**

Registration Table

1. **Check Voter Eligibility: Ask for ID**
   To vote in PB, a person must (1) be at least **[insert minimum age]**, and (2) live in **[insert City name]**.

   To receive a ballot, individuals need to present identification proving their eligibility--and it's your job to check these documents!

   Consult the full list of acceptable IDs (see attached). Use your discretion or consult with staff if someone brings a form of ID not listed.

   If a potential voter does not have sufficient ID, they can get ID and return to vote later, or they can sign an oath (attached) that they meet the eligibility requirements. **Ask City staff what to do if this situation arises, or if you have problems verifying eligibility.**

2. **Record Voter Name and Date of Birth**

   Enter the voter's *full* name and date of birth into a voter registration form on the computer (or printout version if no computer is available). If people seem concerned that you are recording their information, explain that this database is only being used to guard against double voting and to uphold the integrity of the vote; information will not be used for any other purpose and will be deleted after the vote.

   If the voter's name and date of birth are already in the spreadsheet, it will alert you. Do not give a duplicate voter a ballot - they may have already voted online or at another location.

   Ask the voter if they would like to share their email address to receive the future updates about participatory budgeting and the results. Explain that this is optional.

3. **Hand the voter a ballot code or a paper ballot and a survey**

   Printed Ballot Code

   Once you have confirmed that someone is eligible to vote, hand them a paper ballot and survey. Explain the following instructions:

   - **Please fill out both documents** at the voting tables/station *(point to where these are)*.

   - **You should vote for up to [#] projects** but do not need to rank the projects you vote for. Mark your votes clearly with a pen.

   - Your ballot will be discarded if you mark more than **[#] projects**. You cannot vote for a project more than once.

   - The survey is anonymous and confidential - please fill it out now and return it with the ballot. We will then separate the surveys and ballots.

   - **Turn in both the ballot and survey** to the ballot collection table when done.

   Electronic Voting

   Once you have confirmed that someone is eligible to vote, hand them a ballot code. Explain the following instructions:

   - Please log on using this ballot code.

   - **You must vote for [#] projects** and rank your choices (with 1 as your first choice and **[#]** as your last choice).

   - You cannot vote for a project more than once.

   - **Surveys are optional** but we really appreciate your input to determine if and how this process should continue. The survey is anonymous and confidential - please fill it out after completing the vote.

   Voters may ask you **how the winner will be determined or how many projects will win**. Let them know that the votes will be counted, and that the price of the top vote-getter will be taken out of the $**[insert dollar amount]**. Staff will then go down the list of projects, taking out chunks of money for each project until the $**[insert dollar amount]** runs out.

Voting Area

1. Guide voters to a table to vote by paper ballot or electronic ballot.
   - Remind voters that they must vote for **[#] projects**.

2. If paper ballot, collect paper ballots and surveys
   - Ask the voter to confirm that they marked **[#] projects** and remind them that if they have selected more than five, their ballot will be discarded.

   - Remind every voter to turn in their **survey** with the ballot. Separate the ballots and surveys and place them in the appropriate boxes.

   - **Thank voters** for coming! Ask them to take flyers and brochures from the welcome table and to encourage other people in the district to vote.

   - Explain that the **vote results** will be announced shortly after the end of voting. Provide any specific information about the results announcement for your district, as instructed by staff.

   - Ask people to **grab flyers** for the vote on their way out and give them the chance to **sign up to do outreach** for other voting events.

Clean Up and Vote Counting

- As you clean up after the event, be sure to close and log out of the Voter Registration form or spreadsheet on each computer at the registration table to protect participant information.

- At the end of the voting event, count the number of paper ballots and seal them in an envelope labeled with the vote site, date and number of ballots. The vote site coordinator should sign the envelope over the seal.

- Bring the sealed ballots and surveys back to the City office for counting.

Voter Oath

*I understand that to vote in the participatory budgeting process, I must live in **[insert City name]** and be age **[insert minimum age]** or above. I do not have identification to prove my eligibility and/or will be unable to return with identification at a later time.*

I hereby swear that I meet the requirements to vote in this PB process and, therefore, that I am eligible to vote.

Signature _____

Name: _____

Date of Birth: _____

Today's Date: _____