

# *DIY Guide*

# Building an Election Training and Certification Program



The  
Elections  
Group

#### AFFIDAVIT OF VOTER

I affirm under penalty of perjury that I am a United States citizen and an eligible elector; I have been a Colorado resident for at least twenty-two days immediately before this election; I am registered to vote at my sole legal place of residence; I will be at least eighteen years of age on election day; I voted the ballot that was issued to me; and this is the only ballot I have voted in this election.

Required Date 10-25-20

Sign, he or she must make a mark above and below the witness's full name below.  
Firmar: el o ella debe hacer una marca arriba y abajo en cerca de nombre completo o

# Introduction

Welcome to The Elections Group’s guide to building an election training and certification program. This guide is for state or local election officials who want to establish a statewide election training and certification program. If you are a leader at the state level or within your state association of election officials, then you are well-situated to start a training program. However, any election official can prepare a plan, then present it to their association leadership or statewide elections leadership.

## WHAT IS A TRAINING AND CERTIFICATION PROGRAM?

Election training and certification programs teach their audiences, primarily local election officials, the knowledge, skills, and abilities necessary to succeed as an election administrator. These programs offer courses on topics related to election administration, including voter registration, vote by mail, election worker management, etc.

## WHY BUILD AN ELECTION TRAINING AND CERTIFICATION PROGRAM?

It can be difficult for election officials to keep up with the changing demands of their jobs. Statewide training and certification programs offer a solution, by providing election officials with the knowledge and skills that they need to succeed. Many states already offer election training and certification programs. Benefits of those programs include:

- Teaching election officials the knowledge, skills, and best practices necessary to succeed in the field of election administration
- Training new election officials on the foundational skills needed to administer an election
- Ensuring that experienced election officials are refreshed on skills and best practices
- Promoting uniformity in practices across local jurisdictions
- Rewarding election professionals by offering a certificate for completing training

## HOW DOES THIS GUIDE WORK?

This guide will walk you through creating an election training and certification program for your state. As you read the guide, you will be prompted to record information in the corresponding **Election Training and Certification Workbook**. The guide is split into three parts, described briefly below.

### Part 1: Plan a Training and Certification Program

Part 1 will walk you through the process of drafting a program plan. As you read through each section of Part 1, you will complete a corresponding section of the **Election Training and Certification Plan** found in the **Election Training and Certification Workbook**. By the end of Part 1, you will have built a complete program plan. Your plan will describe your program's audience, program owner, program manager, costs and funding, format, and course topics.

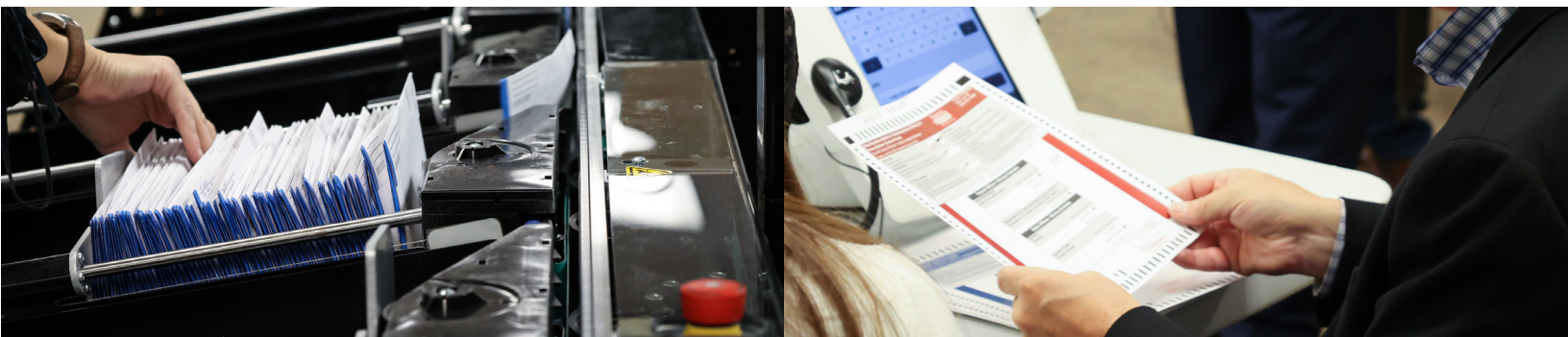
### Part 2: Build Course Curriculum

Part 2 builds on the work you completed in Part 1. Part 2 will guide you through building lesson plans for each of your training courses. You will gain helpful tips for how to create effective slide decks and lecture scripts. By the end of Part 2, you will have the knowledge and confidence to design complete training courses.

### Part 3: Manage a Training and Certification Program

Part 3 should be completed by the program manager you identified in Part 1. Part 3 dives deep into the program manager's responsibilities. It explains the actions that the program manager will need to take to keep the program successful for years to come, including:

- The ongoing recruitment of instructors
- How to budget for a training and certification program
- Keeping course content up to date
- Tracking the progress of program participants
- Communicating with program participants
- Recertifying those who have finished the program





# **Part 1: Plan a Training and Certification Program**

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# Form a Committee

You can complete Part 1 of this guide yourself. However, we recommend completing it with the help of a committee of state and local election officials. By including a diverse group of state and local election officials in program planning, you ensure that the program reflects the needs of election administrators across the state. Further, local election officials may be more enthusiastic about the program if peers helped to develop the program's plan.

Your committee will periodically reconvene to make decisions for the future of your program. Therefore, you should choose committee members carefully. Consider including:

- State and local officials
- Officials from large, medium, and small jurisdictions
- Officials from both major political parties

*List the names, roles, and signatures of your advisory committee members in **Section 1 of your Election Training and Certification Plan.***

## CHOOSE A PROGRAM OWNER

The program owner is the organization whose brand is associated with the program. Some programs are owned by state election officials, like a State Board of Elections or a Secretary of State's office. Other programs are owned by associations of election officials, often referred to as "state associations." Whichever organization chooses to own the program should plan to be involved in funding, high-level decision making, and stakeholder relations for the duration of the program.

Before designating an organization as the program owner, carefully consider who is best situated to own the program, whether that is the Secretary of State's Office, the Department of Elections, the State Board of Elections, or the statewide association of election officials. Here are some guiding questions for choosing a program owner:

- Which organization(s) have the funding, time, and other resources to support the program long-term?
- Which organization(s) may best be able to acquire future funding and other resources for the program?
- Which if any organization(s) are legally required to provide training? If your jurisdiction gives training authority to a particular organization, they may be the best choice as the program owner.

*Once you have determined your program's owner, write the organization's name in **Section 2A of your Election Training and Certification Plan.***



## RECRUIT PARTNER ORGANIZATIONS

Many training and certification programs partner with other organizations, including universities, state associations, and/or state boards. For example, Utah's Olene Walker VOTE Certification program is a partnership between the Utah Lieutenant Governor's Office and Weber State University's College of Social & Behavioral Sciences. Weber State assists the program in several ways, including by providing instructors and facilities for in-person courses.

A strong partner, like a state association or university, can help with almost any aspect of program administration. Consider whether your state association or a state university can assist and enhance your program. If so, consider meeting with those organizations and walking them through your program plan, to see if they can play a role. However, do not be discouraged if you cannot recruit a partner. Many great programs like Colorado's Election Official Certification Program are owned and administered by one entity, in this case the Colorado Secretary of State's Office.

*List any partner organizations in Section 2B of your Election Training and Certification Plan.*

## DIVIDE RESPONSIBILITIES

If your program has both an owner and partner organizations, then you need to decide which responsibilities each organization will handle. Below is a list of major program responsibilities, with a brief description of each. With your committee, discuss which organization is best suited to handle each. You may also need to have a meeting with leadership from your partner organization, to determine what responsibilities they are willing to assume.

- Registering learners - Your program will need to maintain a list of anyone who has enrolled in the program. You may need to verify learners' identities, to ensure that they are part of the program's intended audience.
- Tracking learner progress - Your program will need to keep records of the courses that learners have attended. Your program will also need to track each learner's overall progress toward certification.
- Communicating with learners and instructors - Your program will need to maintain ongoing communication with learners and instructors. This includes sending notices about class times and venues, registration deadlines, and changes to the program or certification requirements, and recruitment and coordination of instructors.
- Procuring facilities for in-person courses - Many programs make use of existing government-owned facilities, including state or local election offices, to hold training courses. Programs that partner with colleges and universities often use their facilities to host training courses.
- Providing course materials and supplies - Your program will likely need supplies, especially if you are providing in person training courses. Supplies include printed materials, notebooks, pens, technology, and anything else used during course instruction. You may also want to consider providing refreshments and/or meals if you plan to conduct day-long or multi-day in-person training.
- Managing finances - This responsibility should probably belong to the program owner, though all organizations involved may need to track finances related to the program.

*In Sections 2A and 2B of your Election Training and Certification Plan, check the boxes to indicate which responsibilities belong to the program owner, and which responsibilities belong to the program's partner organization. If your program has a sole owner and no partner organizations, check all of the boxes in Section 2.*

## CHOOSE A PROGRAM MANAGER

Choosing a program manager is vital to a program's success. This individual will monitor and drive operations for the life of the program. They are responsible for ensuring that deadlines are met regarding instructor recruitment, student registrations, securing facilities for in-person courses, and several other responsibilities.

Typically, a program manager is a full-time employee of the organization that owns the program. However, a part-time employee and/or an employee from a partner organization can also do the job. Choose a program manager who is 1) dedicated to the program and its mission; and 2) has the time and expertise to manage the program's many components.

**Part 3** of this guide is designed to assist the program manager in their duties.

*List your program manager in Section 3 of your Program Plan. Consider listing a second individual to serve as a backup and support for the program manager. This person would assume the role in the event the program manager leaves, retires, or is unable to fulfill their duties.*

## Determine the Program's Audience

The primary audience for any election training and certification program is local election officials. However, you may want to consider inviting other groups to participate in the program. These include:

- State election officials
- Election systems vendors
- Law enforcement
- Other government officials
- Election staff

Should your program train election staff? Election staff in particular stand to gain a lot from election administration training courses. Staff perform most of the day-to-day operations of the election office. So, training them can drastically improve local election administration. However, there are some obstacles to training staff.



- **Staff may have a harder time attending in-person courses.** It may be impossible for both the local election official and one or more members of their staff to attend in-person training on the same day. That could leave the office understaffed, particularly smaller offices.
- **Offices may not have the budget to send staff to in-person courses.** Even if staff have the time to attend, there are travel and lodging costs associated with in-person courses. Jurisdictions may not have the budget to pay for travel and lodging for staff.

Record your program's audience in **Section 4 of your Election Training and Certification Plan**. Use the blank lines to list any additional audience members, beyond local election officials. Use the check boxes to indicate whether the audiences are mandatory or optional - an audience is mandatory if they are legally required to attend training.

## CHOOSE A COURSE FORMAT: IN PERSON VS. ONLINE

In-Person and online courses have their own respective benefits and costs. Carefully consider which format or combination of formats will work best for your program. Use the information below to help you decide.

### In-Person Courses

In-person courses give learners the opportunity to interact face-to-face with their instructors and peers. This can be especially exciting for election officials who spend most of their time on work specific to their own jurisdictions. But hosting in-person courses has its own challenges, including travel expenses, lodging expenses, and choosing a time that works for busy schedules.

In-Person	
Pros	Cons
<p>More direct interaction with peers and instructors.</p> <p>Able to incorporate hands-on activities and simulated activities into lessons.</p>	<p>Some election officials and staff may not be able to attend (for budget, time, other reasons).</p> <p>More expensive (fees for renting facilities, providing lunches, printing in person course materials, etc).</p>

If you choose to offer in-person courses, carefully consider where and when to host those courses. For example, state association meetings and other pre-scheduled gatherings of election officials are great venues for offering courses. Some programs choose to offer courses regionally. This is especially effective in geographically large states, where it is more costly for election officials to travel.

## Online Courses

Online courses eliminate the need to travel or lodge in order to receive training. For this reason, they are an excellent way to include staff in a training program. There are also several ways to deliver an online course. An instructor can deliver a live lecture online and simultaneously through platforms like Zoom or Microsoft Teams. Alternatively, an online course can take the form of a pre-recorded lecture or presentation. Further, online courses can be asynchronous and self-guided. In that format, users can take the course at their own pace, spending as much or as little time as needed to complete each lesson.

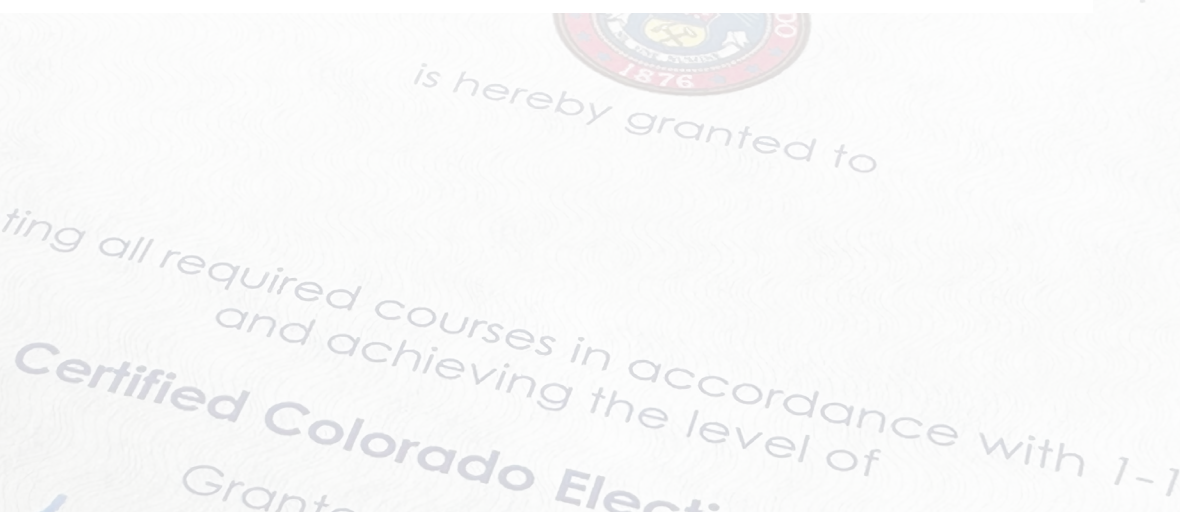
Online	
Pros	Cons
No need to travel or lodge at a hotel.	Less direct peer interaction.
Can take the course as it fits their schedule.	Cannot participate in hands-on exercises.
If asynchronous online, learners can complete a course at their own pace.	

*Now that you have considered your course format, check the boxes for online and/or in person in Section 5 of your Election Training and Certification Plan.*

## Determine Your Program’s Certification Requirements

One of the goals of your certification program is to issue a certificate to election officials who successfully meet your program’s requirements. Carefully consider what those requirements should be. Typically, programs require the following for learners:

- Completion of a minimum number of courses or course hours within a certain time frame (for example, within a calendar year).
- Completion of some set of core courses (for new programs, this often means completing all courses)
- For each course, completion of a post-course assessment (for example, a test or self-assessment)



## Existing Programs

Existing programs have varied certification requirements. Programs require as few as 8 courses and as many as 30 courses for graduation. Some programs can be completed in six months or less, whereas programs like Florida's take several years to complete.

	CO	FL	OH	UT	VA
Certification Requirements	8 core online courses 5 elective online classes 1 in person class	30 courses Participate in a statewide primary and general election cycle	4 core courses 3 elective courses 1 graduate course	10 classes and completion of the corresponding artifacts. An artifact is a work product from each class that demonstrates the concepts taught in the class.	Complete all 11 course modules within 12 months of appointment
	County clerk and recorders must complete within 6 months of taking office Election staff must complete within 1 year of employment	About 4 years to get through the required course load	Certification can be completed in as little as 2 years	Between 1-2 years. The program offers three, two-class sessions per year. 10 classes are required to graduate.	It only takes about 1-2 full work days to complete course content (all online). Courses must be completed annually.

What to consider when establishing certification requirements:

- What is a reasonable amount of time commitment from local election officials? 40 hours in a year?
- Keep in mind that the time commitment is more than just sitting in a class. Consider travel time and time away from the office. Also consider any pre- or post-work expected from participants. This includes any pre-readings. It also includes any time spent on tests or self-assessments.
- What are the minimum knowledge and skills you want all participants to take from the program? Make sure the curriculum addresses all of those. It may help to review your mission statement to see if your program meets those goals.

Some programs, like Colorado's, are legally mandated. Election officials must complete training within six months of taking office. Most states, however, do not have legally mandated training programs. For non-mandatory programs, it is especially important to consider what kind of time, money, and effort commitment the election officials in your state are able to manage. The training program's success depends in part on election officials choosing to participate and become certified.

*Using the information above, complete what remains in **Section 6 of your Election Training and Certification Plan.***

## DETERMINE COSTS:

The body that owns your training and certification program will need to budget accordingly. The following are costs frequently associated with statewide election training and certification programs:

- Leasing facilities for in-person training courses
- Paying instructors and other staff
- Providing food or refreshments during in-person sessions
- In-person material costs (paper, pens, other office supplies)
- Printing costs (manuals, handouts, exercises, etc.)

## Offsetting Costs

Many programs charge a registration fee for courses to help offset costs. Consider doing the same for your program.

The chart below shows what some programs charge per class.

	CO	FL	OH	UT	VA
Class cost for learners	\$20 per in-person offering No cost for online courses	\$90 per class	\$110 per class	Free for county clerks and most senior employee (subsidized by state) For all others, \$100 per session (two classes) or \$50 per class	No cost
Overall certification cost for learners	\$20 (the cost of one in person offering)	\$2700 tuition \$150 graduation cost	\$880 tuition	Free for county clerks and most senior employee \$500 for all others	No cost

It may be worth surveying local election officials before deciding on a registration fee. Remember that learners will also have costs associated with their participation in the program (again, travel, transportation, lodging).

*Use the information above to complete Section 7 of your Election Training and Certification Plan.*

## CHOOSE TRAINING COURSES

Election officials are expected to know a lot. Beyond election administration, election officials are often proficient in cybersecurity, budget management, public records law and policy, communications, and leadership, just to name a few.

The complexity of election administration can make it hard to narrow down to a few training topics, especially for a brand new program. By completing the activity below, you will choose the first set of courses to include in your program. It is okay if not every topic is covered - remember that your program will continue to grow and expand. **This activity is meant to be completed with the assistance of your Committee. If you do not have a Committee, seriously consider convening a group for this exercise.**



### Activity: Decide on Courses

Below a list of sample course topics for an election training and certification program. **Provide each of your advisory committee members with a copy of the list and a pen.** Your advisory committee members will each vote for their top course topics by placing a check mark in the box next to that course title. **Each committee member gets as many votes as courses you plan to offer.** So, for example, if you decide that your program will offer ten courses, then each committee member gets ten votes. The top ten vote getters become your inaugural course topics.

Course Topics:

- Americans with Disabilities Act (ADA) and Elections
- Audits and Recounts
- Ballot Management
- Ballot Proofing
- Budget Development
- Candidate Qualifications
- Canvassing
- Chain of Custody and Documentation
- Conflict Resolution
- Continuity of Operations
- Customer Service
- Cybersecurity
- Duplicate Ballots, UOCAVA, Confidential Addresses and other exceptional procedures

- Early Voting
- Election Communications
- Election Law
- Election Night Reporting
- Elections 101
- Election Security and Risk
- Election Worker (Poll Worker) Management
- Emergency Preparedness
- Ethics
- GIS
- History of Elections
- Human Resources
- Managing Election Technology
- Media Relations
- Mental Health and Resilience
- Physical Security
- Pollbooks and E-pollbooks
- Polling Locations
- Poll Watchers and Observers
- Public Records Management
- Redistricting
- Signature Verification
- Team Building
- Time Management
- Vote By Mail
- Voter Education and Outreach
- Voter List Maintenance
- Voter Registration
- Voting Sites and Facilities
- Voting Systems
- Watchers and Observers
- Wellness and Resiliency

Once each committee member has completed voting, collect the worksheets and tally the results. Let the committee know what the top ten selections were. The activity, however, is not finished. Next, have a discussion with your committee about the top ten vote getters. Seeing them all together, are these the *right* courses?

Follow-up questions for the group:

- Can these courses address the most important and/or pressing issues in the state?
- If not, what is missing?
- Is this course list well-rounded?
- Can or should any of these courses be combined with others?

Note: When considering combining course topics, there are a few things to keep in mind.

- 1 Think about which topics naturally marry well. For example, chain of custody relates to several other topics, including ballot management and vote by mail (particularly drop box voting).
- 2 Think about the particular knowledge and skills that your participants need. For example, maybe your local election officials are having more issues with physical security than cybersecurity. If so, perhaps you could teach physical security as a lesson within a course on polling locations .
- 3 Consider your course length and what can be accomplished in that time.

*After having this discussion, finalize your list of course titles and enter those into **Section 8 of your Election Training and Certification Plan.***



## Activity: Skills and Knowledge

Congratulations! Now you have decided on your course titles. Next, you and your committee will start deciding what lessons are taught in each course. A great way to start building lessons is first to **consider what skills and knowledge your committee would like to see reflected in each course.**

Provide each of your committee members with a copy of the worksheet “Building a Training Course,” which can be found in your **Election Certification and Training Workbook**. On the worksheet, list the title of each course that will be taught in your program. Then, give each member time to list desired skills and knowledge for those courses.

### Skills

When participants leave the course, what should they be able to do? Those are the skills that your courses will teach. Some examples include:

- Manage the mail ballot process for an election from start to finish
- Understand a new election law and comply with its provisions
- Build a continuity of operations plan
- Understand the basics of election worker (poll worker) management
- Successfully give a media interview on a contentious or complex election administration issue
- De-escalate conflict at a polling location

### Knowledge

You should also consider what topics each course should address. For example, if you provide a course on Election Security, should it focus on cybersecurity, securing voting systems, securing ballots, securing facilities and staff, or all of the above?

Once your committee members have completed their worksheets, use the responses to draft a brief 2-3 sentence description of each course. The example below demonstrates how to construct a course description, using the information from the worksheet.

Example:

1. Course Title: Chain of Custody

Skills and knowledge to be gained:

A. Build a chain of custody form

B. Drop Boxes, ballot transfer

C. Organize and retain chain of custody forms (retention schedule, litigation)

**Course Description:**

This course will focus on how to maintain and record chain of custody at important steps of the election administration process, especially when interacting with ballots, drop boxes, and election systems. Students will learn the importance of retraining chain of custody forms according to state and local retention schedules. Upon completing this course, students will be able to draft, use, and retain their own chain of custody forms.

***Congratulations! You have successfully completed Part 1 of Building a Training and Certification Program.***

# **Part 2: Building Course Curriculum**

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# Introduction to Part 2

Welcome to Part 2 of the Elections Group’s guide: “Building an Election Training and Certification Program.” If you have not already, please complete Part 1: Plan a Training and Certification Program before moving forward with Part 2.

In Part 1, you identified the titles of the training courses that your program will offer. You also wrote a brief description of each course. Now, this guide will lead you through the process of turning those titles and descriptions into complete training courses. In this Part, you will:

**Draft a lesson plan**

**Build a slide deck and script**

**Gain the knowledge to confidently design complete training courses**

## GETTING STARTED

This guide will walk you through the process of building a lesson plan and other materials for an election training course. You can complete this guide at your own pace. As you go through the guide, consider getting feedback from others involved in your training program, including your advisory committee.

### *Before you begin*

**Make sure you have the following materials available:**



**LESSON PLAN TEMPLATE**



**EXAMPLE LEARNING OBJECTIVES**



**EXAMPLE LESSON PLAN**

# Draft a Lesson Plan

As you read through this guide, you will complete the “Lesson Plan” template found in the **Elections Training and Certification Workbook**. You will periodically be prompted to add information from your own course to the template. By the end of Part 2, you will have drafted a complete lesson plan for one of your courses!

## WHAT IS A LESSON PLAN?

A lesson plan is a detailed and organized description of one lesson. It describes what students will learn and how to assess their learning. Lesson plans help instructors organize content, materials, time, and instructional strategies.

## WHY DRAFT A LESSON PLAN?

A lesson plan contains all of the information that an instructor needs to successfully lead a course. Lesson plans are important, because they:

- Give instructors a clear idea of how to use time, materials, media, and any other component of instruction.
- Communicate to students what they will learn and how they will be assessed.
- Help instructors organize the classroom experience.
- Help instructors determine the best methods to evaluate students’ mastery of course content

## DIVING IN

Next, you will build a lesson plan using the attached **lesson plan template**. To get started, choose one of the course titles that you or your peers identified in **Program Plan Section 8, Training Courses**. We recommend that you start with the course title for the subject that you are most familiar with. After you have completed this guide, you can follow the same process for each remaining course title.

## BASIC INFORMATION

### Title

The title section is straightforward. You can transcribe the course title directly from **Section 8** of your **Program Plan**. Alternatively, you can modify the course title to make it fun or attention grabbing.

### Date and Time

It is a good idea to keep a generic copy of each course's lesson plan, to distribute to any new instructors. You can leave the date and time blank for the generic copy.

### Instructor Name

Make sure to keep the instructor name updated. Over its lifetime, each course will likely have many instructors. If you have multiple instructors, keep a separate lesson plan copy for each. That way, they can make their own modifications to the material, and keep their own notes related to student feedback.

*Before moving on, complete the Lesson Title, Date & Time, and Instructor Name in your lesson plan. If you do not yet know the date and time or instructor name, you may leave placeholders for those sections for now.*

### Democracy Is a Design Problem

Learn about the importance of the layout and design of not only the ballot, but also other election materials in order to effectively express important messages relating to the election.

*Here is an example of a creative course title from Utah's Olene Walker VOTE Certification program. <https://www.weber.edu/walkerinstitute/elections-certification.html>*

## LEARNING OBJECTIVES

### What are learning objectives?

Learning objectives state what a student should be able to do after completing the course. Clear, precise learning objectives are the foundation of a successful lesson plan.

### Why do learning objectives matter?

Learning objectives matter for a lot of reasons. Good learning objectives:

- Focus the instructor, so that they know what lessons to teach and how much time to dedicate to each lesson.
- Provide a course roadmap for students.
- Inform the assessment methods used to evaluate students' mastery of the course content.



## How to build learning objectives

### Step 1: Identify the skills and knowledge to be gained

You and your peers already completed this step in the **Building a Training Course** worksheet from **Part 1**. Review those worksheets, and choose three to five of the skills and knowledge components. If you are having difficulty choosing three to five, consider prioritizing any skills and knowledge components that appear on multiple worksheets.

### Step 2: Find the right verb

You should carefully choose the verbs in your learning objectives to reflect what students should be able to *do* with the lessons taught in a course. For example, a learning objective for a course on mail ballots could read:

**“Students will be able to *explain* the key provisions of UOCAVA.”**

This is a good learning objective. However, the verb *explain* might not be the best verb in this case, because local election officials need to do more than just *explain* UOCAVA to succeed in their roles. They need to *apply* provisions of UOCAVA to the real-world work of sending, receiving, and adjudicating mail ballots from military and overseas voters. Therefore, a better verb in this case is *apply*. And a better learning objective reads:

**“Students will be able to *apply* the key provisions of UOCAVA to relevant processes including issuing and receiving mail ballots.”**

Finding the right verb can be difficult. The chart below is intended to help you determine what level of learning is right for a particular learning objective. The chart also includes a helpful list of verbs to use when drafting your learning objectives.

## Bloom’s Taxonomy of Educational Objectives (1956)<sup>1</sup>

Level	Description	Suggested Verbs
Knowledge (represents the lowest level of learning)	To know and remember specific facts, terms, concepts, principles or theories	Identify, define, list, label, match, name, select, recall, recognize, repeat, state
Comprehension	To understand, interpret, compare, contrast, explain	Classify, compare, describe, distinguish, discuss, explain, illustrate, select, summarize, translate, rank, rate
Application	To apply knowledge to new situations to solve problems using required knowledge or skills	Apply, calculate, compute, develop, execute, graph, relate, use, operate, organize, practice, implement, solve

Analysis	To identify the organizational structure of something; to identify parts, relationships, and organizing principles	Analyze, inquire, differentiate, organize, demonstrate, integrate
Synthesis	To create something, to integrate ideas into a solution, to propose an action plan, to formulate a new classification scheme	Generate, design, produce, develop, construct, formulate
Evaluation (represents the highest level of learning)	To judge the quality of something based on its adequacy, value, logic or use	Assess, coordinate, monitor, critique, conclude, test, judge

2

Before moving on to Step 3, look back at the **Building a Training Course worksheets**. Consider which verbs apply to the skills and knowledge identified in those worksheets.

### Step 3: Complete the learning objective statement

Now you are going to combine your work from Step 1 and Step 2, to draft a complete learning objective. For example, imagine you are building a course called “Everything you need to know about voting by mail.” Further, imagine that the skill you selected in Step 1 was “How to adjudicate signatures on mail ballots” and the verb you chose in Step 2 was “apply.” Then, your complete learning objective for Step 3 might look like this:

**“By the end of the course, students will be able to *apply* the state’s rules, regulations, and policies to the process of adjudicating mail ballot signatures.”**

Here is another example from The Elections Group’s course “Accessibility in Elections.”

**Step 1: The Elections Group wants learners to leave the class with knowledge of common barriers to voting for voters with disabilities.**

**Step 2: After considering the timeframe of the course and the complexity of the topics covered, The Elections Group chose the verb *identify*.**

**Step 3: By combining Step 1 and Step 2 into a complete statement, The Elections Group came up with, “By the end of this course, learners should be able to identify common barriers to voting for voters with disabilities.”**

<sup>1</sup> For more about Bloom’s Taxonomy, see Armstrong, P. (2010). Bloom’s Taxonomy. Vanderbilt University Center for Teaching. Retrieved June 19, 2024 from <https://cft.vanderbilt.edu/guides-sub-pages/blooms-taxonomy/>.

<sup>2</sup> Course Design, Learning Objectives. Boston College Center for Teaching Excellence. Retrieved June 19, 2024 from <https://cteresources.bc.edu/documentation/learning-objectives/>.

### Step 4: Check your work

Finally, review your learning objective to ensure it best captures what you want students to learn during class. Apply the following checklist from Cornell University's Center for Teaching Innovation<sup>3</sup> to each of your learning objectives.

- Is the outcome specific?
- Is the outcome measurable or observable?
- Is the outcome aligned with the broader outcomes of the course/program?
- Is the outcome realistic and achievable for students?
- Does the outcome identify a clear timeframe (e.g. "by the end of this course, students will be able to...")

Let's compare our previous example to the checklist:

**"By the end of the course, students will be able to *apply* the state's rules, regulations, and policies to the process of adjudicating mail ballot signatures."**

**Is the outcome specific?**

Yes. The objective is not unclear or confusing. A reader is not left with questions about what it means to accomplish the objective.

**Is the outcome measurable or observable?**

Yes. In this case, a **procedural audit** of a local jurisdiction's signature verification process could measure whether the state's policies were followed. Further, case studies and demonstrations could be used in the classroom to measure students' mastery of the lesson.

**Is the outcome aligned with the broader outcomes of the course/program?**

Yes. This outcome is consistent with the broader goals of an election training and certification program. Specifically, it prepares election officials to do an important job duty in compliance with law and policy.

**Is the outcome realistic and achievable for students?**

Maybe. This depends on the length of your course and the complexity of the other learning objectives. In this case, the objective is realistic and achievable in a four hour course on mail ballot adjudication. However, the objective might be too complex or time consuming in a two hour Vote by Mail course. Here's how we might change the objective for a shorter course:

**"By the end of the course, students will be able to *find and identify* state laws, regulations, and policies related to adjudicating mail ballot signatures."**

### How many learning objectives should each lesson have?

A lesson can have as few as one and as many as five learning objectives. If you try to achieve too many objectives, students may lose focus or attention. However, the decision to use more or fewer objectives is yours. Carefully consider how many learning objectives will fit in your class, and whether or not it is realistic for students to meet all of your objectives.

<sup>3</sup> Lawlor, K. B. (2012). Smart goals: How the application of smart goals can contribute to achievement of student learning outcomes. In *Developments in business simulation and experiential learning: Proceedings of the annual ABSEL conference* (Vol. 39).

## PLANNING THE LESSON

The **lesson plan template** uses a lesson plan model called WIPPEA or sometimes WIPPEAR<sup>4</sup>. WIPPEA stands for warm-up, introduction, presentation, practice, evaluation, application, and reflection. Below is a description and example of each step of the WIPPEAR model. The examples provided are from a four hour course titled *Accessibility in Elections*.

### Warm-Up

Use this time to get students thinking about their current level of understanding of the course and learning objectives. If you are teaching the second course in a series, use this time briefly to recap the learning objectives taught in the previous course. For example:

Warm-up	Large group activity  “[R]aise your hand if you feel extremely confident that you can review any polling place for ADA compliance and spot and resolve all issues. Raise your hand if you feel somewhat confident...”	5 minutes
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### Introduction

This is when you will introduce the purpose of the lesson by stating and displaying the learning objectives. You should also use this section to motivate students to learn, by explaining how the lessons relate to their work in elections. This is also your opportunity to generate interest in the topic and excitement about the topic. For example:

Introduction	<p>Slide Deck Unit: Display Learning Objectives</p> <ul style="list-style-type: none"><li>Objective 1: By the end of this course, students should be able to identify common barriers to voting for voters with disabilities.</li><li>Objective 2: By the end of this course, students should be able to apply the ADA checklist to a polling location to ensure compliance.</li></ul> <p>Slide Deck Unit: Explain importance of Objective 1</p> <ul style="list-style-type: none"><li>Access to voting is a fundamental right.</li><li>Under federal and state law, election officials are responsible for providing an accessible voting experience.</li></ul> <p>Slide Deck Unit: Explain importance of Objective 2</p> <ul style="list-style-type: none"><li>Polling places that do not comply disenfranchise voters with disabilities.</li><li>Non-compliance may lead to lawsuits or audits by the Department of Justice.</li></ul>	20 minutes
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<sup>4</sup> TEAL Center Fact Sheet no. 8: Effective Lesson Planning. The Literacy Information and Communication System (LINCS). Retrieved June 19, 2024. <https://lincs.ed.gov/state-resources/federal-initiatives/teal/guide/lessonplanning>.

## Presentation

This is when you teach the knowledge and skills to accomplish your learning objectives. Use this space to plan what you will present, and how long you will spend on each unit. It is perfectly fine if most or all of your presentation will be done through a slide deck. However, you may also wish to include readings, videos, podcast audio, or other forms of media in the lesson.

Presentation	Slide deck unit that addresses the following topics: <ul style="list-style-type: none"> <li>• Definition of Disability</li> <li>• Visible and Invisible Disabilities</li> <li>• Laws and Rules</li> </ul> Bread for video: Accessible Elections followed by discussion Slide deck unit on Accessible Voting Slide deck unit on ADA Compliance at Polling Place Slide deck unit on Best Practices and Innovation ADA and Accessibility Training Video	60 minutes
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## Practice

This is when students will practice their new skill. Give students an activity or worksheet that tests how well they have retained course knowledge. During this part of the lesson, students should not be judged and should feel safe to make mistakes.

Practice	Independent Activity <ul style="list-style-type: none"> <li>• Instruct students “For the next 10 minutes, list barriers to voting for voters with disabilities. If you have extra time, begin listing ways to remove those barriers.”</li> </ul> Large group share out <ul style="list-style-type: none"> <li>• Call on a few students to share their responses.</li> <li>• For each response, ask volunteers to suggest how to remove the barrier.</li> </ul>	15 minutes
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If your lesson plan has multiple learning objectives, then you may want to incorporate instances of practice within your presentation. For example, you may give a slideshow presentation on learning objective 1, followed by a video on learning objective 1, then practice of learning objective one, all before moving on to learning objective 2.

**Advice for Online, Self-Guided Courses:** Practice may look different in an online course, especially because students will not have an opportunity to discuss their answers. For each practice question, make sure to provide your online students with the correct answer and an explanation of how to achieve that answer. It is also helpful to refer students back to the presentation, identifying which section of the lesson is related to each practice question.

## Evaluation

This is when you will test students' mastery of the skills and knowledge taught during your presentation. The verbs you chose for your learning objectives will help you decide which kind of evaluation to perform on your students. Using the chart below, you can see that a learning objective that uses the verb "identify" is best evaluated through multiple choice, true/false, or fill-in-the-blank questions. But a learning objective that uses the verb "apply" is better evaluated through case studies or hypothetical questions.

If your learning objective uses the verb...	Then the best evaluation method is...
Identify, define, list, label, match, name, select, recall, recognize, repeat, state	Multiple choice, true/false, fill-in-the-blank
Classify, compare, describe, distinguish, discuss, explain, illustrate, select, summarize, translate, rank, rate	Short-answer, discussion question, comparison chart
Apply, calculate, compute, develop, execute, graph, relate, use, operate, organize, practice, implement, solve	Case study, simulation, role play, hypothetical questions
Analyze, inquire, differentiate, organize, demonstrate, integrate	Case study, discussion questions, debate, essays, presentations, role play
Generate, design, produce, develop, construct, formulate	Projects, case studies, simulations, critiques
Assess, coordinate, monitor, critique, conclude, test, judge	Case studies, critiques, hypothetical questions

The example below shows how you might evaluate students' mastery of learning objectives 1 and 2 from the course *Accessibility in Elections*.

Evaluation	Test: Learning Objectives 1 and 2 <ul style="list-style-type: none"> <li>• Objective 1: By the end of this course, students should be able to identify common barriers to voting for voters with disabilities.</li> <li>• Objective 2: By the end of this course, students should be able to apply the ADA checklist to a polling location to ensure compliance.               <ul style="list-style-type: none"> <li>• Multiple choice questions "Which of the following is a barrier to voting for individuals with disabilities?"</li> <li>• True/False "True or false: A voter must prove that they have a disability before using accessible voting equipment."</li> <li>• Case Study Describe a polling location, indicating some elements that are in compliance with the ADA and others that are not.  Instruct students to "Read the above case study, identifying any elements of the polling place that are in non-compliance with the ADA, and explain how an election official could address the issue to comply with the law."</li> </ul> </li> </ul>	40 minutes
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You do not necessarily need to grade each assessment as part of a lesson, though you may. You may decide it is sufficient to go over the answers with the class, or to share an answer key with the class. You may also decide to dedicate instructional time to going over some or all test answers.

Pros and Cons of Grading Student Evaluations (Tests)	
Pros	Cons
<p>Students may put more effort into a graded evaluation</p> <p>Evaluations can reveal student strengths and weaknesses, which can inform future trainings</p>	<p>Grading evaluations takes time</p> <p>You will have to decide what comes next for students who fail an evaluation</p>

Consider some pros and cons of grading evaluations, and then decide what works best for your program.

**Advice for Online, Self-Guided Courses:** A benefit of online courses is the ability to grade evaluations in real time, at least for certain question types like multiple choice or true/false.

## Application

Beyond the evaluation, this is another opportunity for students to test skills. This step of the process also gives students a chance to put the lesson into context, and consider how it applies in their lives and work.

Application	<p>Small group activity:</p> <ul style="list-style-type: none"> <li>• Stage part of the classroom to simulate a polling location with instances of ADA non-compliance.</li> <li>• Break the room into stations, each with one to three non-compliance issues.</li> <li>• Break students into small groups. Assign each group to a station. Instruct them to identify any non-compliance issues and discuss within their groups how a local election official could resolve the issue. Discuss short-term and long-term solutions.</li> <li>• Rotate groups so that each group attends each station.</li> </ul>	30 minutes
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**Advice for Online, Self-Guided Courses:** Application can be more difficult in online courses. Online students cannot interact with their peers or perform hands-on activities. However, there are still plenty of opportunities to apply lessons online. Think about the example in the chart above - a simulated polling place with instances of ADA non-compliance. While you cannot simulate a polling place in an online course, you can show pictures with examples of ADA non-compliance. To apply the lesson, you might instruct students to identify all of the examples of non-compliance shown in the picture. You can then give students the correct answer.

## Reflection

Finally, curate an opportunity for students to reflect on the lesson. This should encourage students to consider how the lesson applies to their own work and lives.

<p>Reflection</p> <p><i>Create an activity that asks students to reflect on what they have learned and how and when they will use it.</i></p>	<p>Independent Activity</p> <ul style="list-style-type: none"> <li>• Instruct students to complete a reflection worksheet.</li> <li>• “What if anything will you do differently the next time that you review a polling place for ADA compliance? Why?”</li> <li>• “What if anything will you do differently to remove barriers to voting for people with disabilities? Explain.”</li> <li>• “Are there any other practices you will change in your life or work because of this course?”</li> </ul> <p>Large Group Share Out</p> <ul style="list-style-type: none"> <li>• Leave time to get one or two volunteer answers for each of the questions.</li> </ul>	<p>20 minutes</p>
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Once you have completed the above, you have a full lesson plan for your first course! Do the same for each of the course titles that you identified in Part 1.

## Build a Slide Deck

Once your lesson plan is complete, you can begin gathering and constructing your lesson materials, including a slide deck. As you build your presentation, periodically review the lesson plan to make sure that the presentation reflects the plan. Ensure that sections of your presentation address each of your learning objectives. Review the presentation to ensure that the most important skills and knowledge are addressed, with opportunities for learners to practice.

### TIPS FOR BUILDING A SLIDE DECK

#### Use graphics to illustrate concept<sup>5</sup>

Learners prefer lessons with visuals and some visuals lead to increased learning. In your slides, include graphics that illustrate or explain important concepts. For example, here is a graphic that demonstrates the 5S approach to spatial organization:

Even if you are unfamiliar with the 5S approach, this graphic quickly summarizes important information. You can see that the steps, in order, are sort, set, shine, standardize, and sustain. Charts, tables, graphs, and diagrams are other examples of graphics to include in your slide decks.



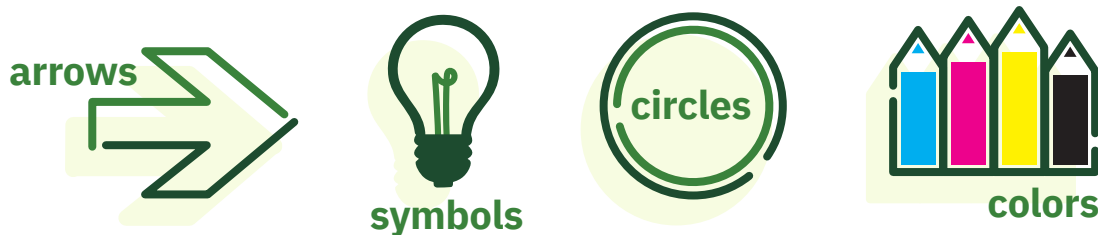
<sup>5</sup> For more information on evidence-based use of visuals, see Clark, Ruth Colvin. “Chapter 5: Visualize Your Content.” Evidence-Based Training Methods, Third Edition ed., ATD Press, Alexandria, Virginia, 2020, p. 91 – 117.

## However, avoid graphics that are purely decorative

Students give higher ratings to lessons that incorporate graphics. However, these higher ratings do not always correlate with better learning. Studies have shown that decorative graphics, those that add visual interest but do not explain or illustrate a concept, may actually be *detrimental to learning*. Whether a graphic is decorative or instructional depends on the lesson being taught and how the graphic is being used. As a rule of thumb, do not include graphics just to make your presentation look nicer. Consider whether each graphic helps to demonstrate a concept taught in your lesson.

## Draw attention to key points with visual cues

Visual cues can help learners pay attention to important elements of a slide deck for longer.<sup>6</sup> Consider using cues to draw attention to important information:



## Maintain a polite and conversational tone<sup>7</sup>

Evidence shows that addressing learners in a conversational manner promotes deeper learning. Additionally, research shows that the use of first and second person phrases can promote learning, compared to more formal third-person instruction.

## Less is more<sup>8</sup>

You may feel pressure to include as much information as possible in your lesson. However, just because you cover content does not mean that students will retain the information. Focus on providing information that is directly relevant to your learning objectives. This includes avoiding anecdotes and stories that do not help students accomplish a learning objective, even if the stories are interesting or somewhat related.

<sup>6</sup> Clark, Ruth Colvin. "Chapter 5: Visualize Your Content." Evidence-Based Training Methods, Third Edition ed., ATD Press, Alexandria, Virginia, 2020, p. 91 – 116.

<sup>7</sup> See Clark, Ruth Colvin. "Chapter 8: Make Learning Personable." Evidence-Based Training Methods, Third Edition ed., ATD Press, Alexandria, Virginia, 2020, p. 157 – 180.

<sup>8</sup> See Clark, Ruth Colvin. "Chapter 9: When Less Is More." Evidence-Based Training Methods, Third Edition ed., ATD Press, Alexandria, Virginia, 2020, p. 181 – 202.

## Drafting a script

Consider drafting a full script and/or comprehensive speaker notes for your presentation. This helps the instructor stay organized and on-point while delivering the course material. It will also ensure that course presentations are consistent if multiple instructors present the course. Once completed, review the script to ensure that key skills and knowledge for each learning objective are covered.

## STUDENT FEEDBACK AND INSTRUCTOR NOTES

The lesson is not quite complete once instruction is over. An important part of lesson planning is receiving student feedback. Consider sending out a post-course survey. The survey should measure students' impressions of how engaged they were, how well they learned the course information, and any other helpful information. Use those surveys to improve future iterations of the lesson. For example, if many students indicate that a particular topic was unclear, consider redrafting the unit. If students find that a particular unit is not applicable to their work, consider removing that unit. Conversely, if students wish they had spent more time on a unit, consider lengthening that unit.

The instructor should also record their own feedback. This might include any comments they heard from students, their own impression of how the lesson went, any areas where students seemed more or less enthusiastic, etc. All of this information can be recorded at the end of your lesson plan.

## MATERIALS

Maintaining a list of needed materials ensures that instructors do not show up to class unprepared. Think broadly when making your list of materials. List any documents, office supplies, software, hardware, etc. Include materials that will need to be supplied by the venue hosting the event, like projectors, screens, etc. The following is an example based on the course Accessibility in Elections.

### Example Materials List

- A laptop with Microsoft Office installed and/or any other relevant software or internet connectivity
- A digital copy of the course "Accessibility in Elections"
- A projector and screen
- Pens for each student
- A copy of the federal "ADA Checklist for Polling Places" for each student
- 12 blank poster boards along with markers

Also list the activities needed to prepare for the course, so that the instructor is organized on the day of class. If you are relying on the class venue to provide any materials, like a projector and screen, make sure to include those activities as well.

#### Example Preparation Activities

- Confirm that the venue has a projector and screen available or already installed.
- Set up the “Accessibility in Elections” slide deck on the laptop
- Place “Vote by Mail” guides near the entrance to the classroom, so that each student can grab a copy as they enter the room.
- Set up the classroom for the activity: ADA polling location compliance.

In your lesson plan, list all the materials and preparation activities that your lesson requires.

*Congratulations! You have successfully completed Part 2 of Building a Training and Certification Program.*



# **Part 3:**

# **Manage a Training and Certification Program**

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# Introduction to Part 3

Welcome to Part 3 of The Elections Group’s guide: “Building an Election Training and Certification Program.” If you have not already, please complete Part 2: Building Course Curriculum before moving forward with Part 3.

In Part 2, you drafted a lesson plan for a training course. You also crafted learning objectives and considered how to build scripts and slide decks for your program’s training courses. Part 3 will guide you through the day-to-day work required to maintain a training and certification program, including:

- The ongoing recruitment of instructors**
- How to budget for a training and certification program**
- Keeping course content up to date**
- Tracking the progress of program participants**
- Communicating with program participants**
- Recertifying those who have finished the program**



## GETTING STARTED

Part 3 is intended for your **program manager**—the individual who is accountable for the day-to-day operation of the program. As the program manager reviews this guide, they should ensure that your program has a process in place to administer each of the responsibilities discussed below.

# Choosing and Recruiting Instructors

Your choice of instructors is important. For learners, instructors are the face of your program. They should be knowledgeable, representative of your constituents, and engaging. Typically, you should choose instructors from the following categories:

## Local election officials

Experienced local officials and their staff can speak as experts and peers, making them effective messengers who know what is realistic and practical within your state. They are ideal to lead classes on best practices and practical administrative topics like voter registration, logic and accuracy testing, provisional balloting, processing mail ballots, etc.

## State election officials

State election officials have a bird's eye view of administrative practices in jurisdictions across their states. They are ideal to lead classes on legal and regulatory topics, including introductions to elections, ballot access, overseas and military voting, etc.

## University professors

Many election certification and training programs partner with colleges and universities to administer their programs. One benefit of these partnerships is that professors make excellent program instructors. Professors are typically well-versed in adult education and knowledgeable on how to structure course content, especially if that content is developed in collaboration with election officials.

## Other experts with relevant experience

Training and certification programs generally focus on election administration, but sometimes it is important to teach election officials and staff other skills too. Consider recruiting trusted experts nationwide to lead classes on topics such as communications, ethics, security, the legislative process, and more. These experts may include media professionals, cybersecurity experts, state or local information technology officers, state representatives, executive office holders, etc.

## SUCCESSFUL RECRUITMENT

To ensure you successfully recruit high-quality instructors, consider the following tips:

### Be clear about instructor responsibilities

Instructors do much more than simply show up on the day of a course and read a slide deck presentation. Engaging instructors will spend time reviewing course material and preparing to deliver a course lecture or lead an exercise or discussion. Instructor responsibilities may include:

- Reviewing and updating course content
- Editing speaker notes, presentation slides, handouts, etc.
- Preparing thoughtful discussion questions and activities for learners
- Creating and grading tests and quizzes

### Start early

You should begin recruiting instructors well before course sessions so that the instructor can become familiar with the material and complete the responsibilities discussed above.

### Provide incentives to teach

Instructors play such an important role in a successful program, that many states provide incentives to recruit the best. Some states pay instructors a teaching stipend. Other states offer course credit or exemption from certain program requirements to those who teach a class.

## Budget Considerations

### COSTS

The entity that owns your training and certification program will need to budget accordingly to cover the costs of administering your program. The following are costs frequently associated with statewide election training and certification programs:

- Purchase of (or subscription to) a learning management system (or, LMS).
- Leasing facilities for in-person training courses.
- Paying instructors and staff.
- Providing food or refreshments during in-person sessions (as permitted by your state laws and budget).
- In-person material costs (paper, pens, other office supplies).
- Printing costs (manuals, handouts, exercises, etc.).

## FUNDING SOURCES

Funding is different for each program. However, many programs charge a registration fee for courses to help offset costs. Consider doing the same for your program.

The chart below shows what some programs charge per class.

	CO	FL	OH	UT	VA
Class cost for learners	\$20 per in-person offering No cost for online courses	\$90 per class	\$110 per class	Free for county clerks and most senior employees (subsidized by state) For all others, \$100 per session (two classes) or \$50 per class	No cost
Overall certification cost for learners	\$20 (the cost of one in person offering)	\$2700 tuition \$150 graduation cost	\$880 tuition	Free for county clerks and most senior employee \$500 for all others	No cost

It may be worth surveying local election officials before deciding on a registration fee. Remember that learners will also have costs associated with their participation in the program (again, travel, transportation, lodging).

## Refreshing Course Content

Laws, policies, and practices change over time. Therefore, you should review and update your course content regularly, at least once a year. As the program manager you can do this process yourself. Or, you can delegate this process to trusted individuals with election expertise, including state-level election staff or the committee that advised you in **Part 1**.

As you update courses, account for any changes to election administration since the last time that you reviewed course content. As a starting point, consider the following:

- Legislative changes
- Regulatory changes
- Changes to policies or standard operating procedures
- New state programs or initiatives.

# Registering and Tracking Learners

You will need to track learners' progress for a number of reasons. It will show you which learners have met all program requirements and are ready to graduate. Tracking will also allow users to inquire as to how many and which courses they should take for program completion.

## TRACKING PROGRESS WITH A LEARNING MANAGEMENT SYSTEM

A learning management system or "LMS" is a software platform that can be used to create and distribute courses and manage a training program.<sup>1</sup> Learning management systems are most often used in the context of online learning. However, they can also provide value for programs with in-person courses, by allowing for the easy registration and tracking of learners.

Many learning management systems offer a free trial, or, in some cases, even a free version. Additionally, most learning management platforms make it easy to schedule a demo, before making any commitment to a particular product. Some examples of popular learning management systems are:

- [360 Learning](#)
- [Accord LMS](#)
- [Anthology/Blackboard Learn](#)
- [Moodle LMS](#)
- [OpenLMS Work](#)
- [TalentLMS](#)
- [Appsembler Tahoe](#)

There are several advantages to using an LMS to administer your training and certification program. LMSs offer many benefits, including the following:<sup>2</sup>

### Content delivery

An LMS provides a central place for instructors or administrators to create and deliver content, and for learners to access it, usually anytime and anywhere. This content can be text, video, audio, and interactive content, among others.

### Student management and interaction

An LMS allows learners to interact with each other and their instructors. This can be through discussion boards, chat, and other collaborative tools. They also manage learners by tracking their progress and performance and providing feedback.

<sup>1</sup> <https://360learning.com/blog/what-are-learning-management-systems-lms/>

<sup>2</sup> From Forbes Advisor updated 12/09/2023 <https://www.forbes.com/advisor/business/best-learning-management-systems/#:~:text=View%20More-,What%20Is%20a%20Learning%20Management%20System%3F,corporate%20organizations%20to%20facilitate%20learning.>

## Assessment and reporting

LMSs can be equipped with tools to create online quizzes or tests, either as stand-alone assessments or integrated within the learning content. They also provide reporting features that enable the tracking and analysis of learner performance. This data can be used to tailor learning paths or improve course content.

## Integrations and standardization

Many LMSs are designed to integrate with other systems, such as human resources or school databases.

## Customization and personalization

LMSs allow customization of the learning process to meet individual or group needs, ensuring a more personalized and effective learning experience. They can adapt to a learner's skills, pace, and learning preferences, and offer personalized learning paths.

## Scalability

An LMS can scale to accommodate an increasing number of learners, which is especially valuable for growing organizations. It's capable of handling large amounts of data and user accounts.

Pros and Cons of Learning Management Systems	
Pros	Cons
<p>Learning Management Systems make it easier to:</p> <ul style="list-style-type: none"> <li>• Register learners</li> <li>• Track learner progress</li> <li>• Communicate with learners</li> <li>• Host and administer online courses</li> <li>• Build interactive online course content</li> </ul>	<p>Learning Management Systems:</p> <ul style="list-style-type: none"> <li>• Typically have subscription costs that may not fit in every state's budget</li> <li>• Require a time investment from the program manager and others to learn how to use the system</li> </ul>

These systems often have several tools that can allow for increased communication between learners and instructors, document sharing, virtual group discussions and learning, program progress tracking, and assessment administration, in addition to providing online course administration.

Whether you choose to acquire a commercially available LMS will depend on your program's budget, as well as other factors. Programs with fewer learners may not need a LMS to register and track progress, but programs with many learners may find increased value in an LMS. Programs with university partnerships may be able to use the university's LMS.

## TRACKING PROGRESS WITHOUT A LEARNING MANAGEMENT SYSTEM

If you do not use a learning management system, your office may be able to leverage existing software including a spreadsheet or other database software to track learner progress. The vital information to capture includes:

- Each learner's name, role, and jurisdiction.
- The date that the learner registered for the program and/or their first course.
- The title and session information for each course that the learner has completed.
- The total number of program credits that the learner has earned.

In addition to tracking this data, you should develop a process for issuing graduation certificates to learners who meet all of the program requirements.

## Communicate with Learners

There are many reasons to maintain regular contact with your audience of learners. Regular communication will keep your learners engaged with the program. It also ensures that learners are aware of the course offerings that are available to them.

- Upcoming sessions
- New course offerings
- Changes to certification requirements
- Frequently asked questions

You will also have to respond to questions from learners. It is best to have a single, designated email address where learners can send questions. The program manager should plan for themselves or another employee to check this inbox frequently. Expect questions about:

- How to register
- Progress toward graduation/certification
- How to access course content and materials
- How to get in touch with instructors



## Graduation

Some programs may wish to add a graduation component to their certification program. This can range from a simple certificate presentation to a full graduation event. Program owners and administrators should consider determining graduation costs and payment directives early in the planning process. Program owners should also consider the benefits of holding a full graduation ceremony for learners and how often they will be held. As mentioned above, learners complete certification at varying paces which will need to be accounted for should a program wish to implement a graduation ceremony.

## Recertification

Program owners and administrators should begin thinking about graduation and recertification in the early stages of program development. After initial certification, learners will need access to recertification requirements and courses as a means to continue their education and ensure their original certification remains relevant in the ever-changing landscape of election administration. Many programs offer either core courses and a range of electives or a progression from basic courses to advanced topics. Program owners will need to decide when recertification courses will be offered, and how — several programs have opted for in-person only learning options for renewal courses, while others allow for hybrid learning. Furthermore, program administrators should be prepared to track learning progress and notify the appropriate contact person within every learner's organization to advise of the recertification process and when learners need to recertify.

The table below shows how four different states handle recertification:

Colorado	Florida	Ohio	Virginia
Completion of four online or in-person courses by July 31 of each year, and one in-person class every four years	Renewal every two years by taking one four-hour renewal course	Completion of eight courses, then one graduate class every three years to maintain certification	All certification courses must be taken within 12 months of re-appointment

# Plan for Course Delivery

As program manager, you are responsible for ensuring that courses run smoothly. To ensure that courses are delivered successfully, you should plan ahead for any in-person or online course offerings.

## IN-PERSON SETUP

Course scheduling is critical to new program success. Program administrators should be prepared to coordinate course offerings and ensure that they are offered at convenient times and locations for learners, and a course delivery modality should be selected for each offering prior to scheduling. Programs with specific course requirements may need to remain flexible by repeating courses annually or on multiple dates in a term, or by providing self-paced online instruction to allow for the varied schedules of participants. Some program administrators have found that offering classes multiple times at regional gatherings of their state association has helped to maximize attendance.

## ONLINE COURSE SETUP

Setting up online courses requires careful planning and organization, even if you do not have a Learning Management System (LMS). Start by choosing a reliable platform for delivering your courses, such as Zoom, Microsoft Teams, or Google Meet, which can facilitate live sessions and interactive discussions. Ensure that instructors are familiar with the chosen platform and provide training if necessary.

Decide whether online courses will be live (synchronous) or self-paced (asynchronous) and schedule them to accommodate learner availability. Ensure that all course materials, such as videos, slides, and readings, are easily accessible to learners via email or a shared drive. Careful planning will lead to a more effective learning environment.

## Wrapping up

*Congratulations! You have successfully completed Part 3: Building a Training and Certification Program.* If you have additional questions about training and certification, please contact us via email at [Support@electionsgroup.com](mailto:Support@electionsgroup.com).

We wish you continued success in the development and management of your state's training and certification program.





[electionsgroup.com](http://electionsgroup.com)