Electoral Management Bodies Training and Capacity Building

Best Practices, Challenges and Approaches

November | 2023
Effective training of electoral staff is essential to fostering public trust and confidence in the electoral process. The training serves as a means for election officials to understand and uphold the values of impartiality, integrity and transparency, thus promoting the credibility of elections. The current study analyses existing global trends in electoral training and capacity building focusing mostly on the election officials at the polling station level.

The study has been conducted on the request of the Ukrainian CEC as a part of the IFES assistance provided to the Commission in administering electoral processes through customized training of election officials and the establishing of the CEC Training Center.
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This publication was developed by the International Foundation for Electoral Systems (IFES) in Ukraine through the support of the United States Agency for International Development (USAID), Global Affairs Canada, and UK aid. The opinions expressed herein are those of the authors and do not necessarily reflect the views of USAID or the Government of the United States, Global Affairs Canada or the Government of Canada, or the Government of the UK.
Acknowledgements

IFES Ukraine would like to thank to electoral officials and Training authorities from Poland, Romania, Canada, Australia, Bulgaria, Brazil, Georgia, Moldova, North Macedonia and Mexico for participating in interviews, responding to written questions, participating in the survey and submitting research materials. Their insights, passion and dedication were invaluable and inspiring.

Authors would like to pay credits to Gio Kobakhidze for conceptualizing and guiding the project, Rebecca Duncan for organizational support, Olha Sharaienko, Svitlana Franchuk and Diana Ashurova for their assistance with this project.
In Ukraine, IFES efforts to strengthen democratic progress are supported by the United States Agency for International Development, Global Affairs Canada, and UK aid. To date, these efforts have led to unprecedented progress in:

- ensuring free, fair, and inclusive elections;
- advancing political integrity;
- strengthening Ukraine’s digital transformation and cybersecurity resilience;
- championing the political and electoral rights of all Ukrainians;
- fostering informed and engaged citizenship.
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# Acronyms

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<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>AEA</td>
<td>Association of Electoral Administrators (UK)</td>
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<td>AEC</td>
<td>Australian Electoral Commission</td>
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<tr>
<td>AEP</td>
<td>Permanent Electoral Authority (Romania)</td>
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<td>CEC</td>
<td>Central Electoral/Election Commission</td>
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<td>CICDE</td>
<td>Center for Continuous Electoral Training in Moldova</td>
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<td>ECI</td>
<td>Election Commission of India</td>
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<td>EMB</td>
<td>Election Management Bodies</td>
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<td>EMBS</td>
<td>Electoral Management Board of Scotland</td>
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<td>ERRWG</td>
<td>Elections, Registration and Referendums Working Group (UK)</td>
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<tr>
<td>IFES</td>
<td>International Foundation for Electoral Systems</td>
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<td>IIIDEM</td>
<td>India International Institute of Democracy and Election Management</td>
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<tr>
<td>LMS</td>
<td>Learning Management System</td>
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<td>NTEU</td>
<td>National Training and Education Unit</td>
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<td>SEC</td>
<td>State Electoral Commission of North Macedonia</td>
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<td>TO</td>
<td>Training Officer</td>
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<td>TOT</td>
<td>Training of Trainers</td>
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<tr>
<td>TSE</td>
<td>Superior Electoral Tribunal (Brazil)</td>
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<tr>
<td>SOLACE</td>
<td>Society of Local Authority Chief Executives</td>
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<tr>
<td>RO</td>
<td>Returning Officer</td>
</tr>
<tr>
<td>WEPWG</td>
<td>Welsh Electoral Practitioners Working Group</td>
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<tr>
<td>USAID</td>
<td>United States Agency for International Development</td>
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Executive Summary

Purpose and Methodology of the Report

IFES Ukraine provides technical assistance to the Central Election Commission (CEC) of Ukraine in administering electoral processes through customized training of election officials and providing expertise in critical areas of electoral reform. The Ukrainian CEC requested IFES Ukraine to conduct research and provide recommendations regarding the experience of other countries in capacity-building and training of election officials. This experience will be used in institutionalizing the new CEC Training Center.

This report explores electoral training and its application in different countries around the globe. Report authors understand the process of teaching participants of electoral skills necessary for involvement in administration of elections. There are two dimensions of electoral training: Continuous capacity-building of election management bodies (EMBs) staff and representatives of electoral stakeholders as well as operational training offered to temporary election officials and staff, including poll workers, operators of electronic systems and accountants.

The report focuses on electoral training provided to poll workers and other temporary election officials, how electoral training is institutionally organized by different EMBs, methodologies are used and training delivery modalities. Thirty-three countries, mostly with independent EMBs, were included in the desk research. With representatives of seven EMBs, report authors conducted online interviews. Thirty trends in the development of electoral training were identified in the report. Based on these findings, general recommendations were developed and are being proposed at the report’s conclusion.

Key Findings

Electoral training plays a crucial role in building public trust and confidence in the electoral process. When voters see that election officials are knowledgeable, well-trained and capable of administering elections fairly and efficiently, they are more likely to have faith in the electoral system. Training helps election officials understand and uphold the principles of impartiality, integrity and transparency, contributing to credible elections. It helps them implement fair voting procedures, accurately count and verify votes and address irregularities that may arise during the electoral process.

During the last decade, the electoral training landscape witnessed significant developments. Institutional training models evolved from decentralized in-house forms to independent institutions with a large mandate. Over 30 independent electoral commissions around the globe established different forms of electoral training centers, recognizing training as essential for both standardized and specialized training.

There is a growing demand for information technology specialists, including artificial intelligence (AI), to accommodate the increasing integration of technology in electoral training. Professionals forming a pool of trainers are largely engaged in delivering training programs, while the involvement of local authorities remains crucial in organizing training workshops around the country.

Continuous professional development and mandatory certification of election officials are becoming key aspects of training initiatives. The categories of election officials being enrolled in the training programs are on the rise, necessitating diversification and an increased number of training programs. Offering continuous training is in line with the best practices and recommendations of the Council of Europe’s Venice Commission reflected in the Code of Good Practice in Electoral Matters, which mandates that training is provided to election officials at all levels of election administration.
Customizing training became a usual practice aimed at addressing specific needs of different contexts in rural and urban areas. Training plans are closely aligned with institutional objectives and strategic documents. Independent training entities, or training centers, develop their own strategic plans based on their vision with the mission of the election management body.

The COVID-19 pandemic accelerated adoption of online training methods and learning management systems. As social distancing measures and lockdowns became necessary to curb the spread of the virus, traditional in-person training and educational activities faced significant disruptions. In response to these challenges, training entities turned to virtual alternatives to provide training to electoral officials at all levels. After the official declaration of the end of the pandemic, hybrid approaches, combining online and in-person training were widely used. Involvement of software vendors in learning management systems increased management responsibilities.

Trainers usually deliver training in pairs, provide feedback on training implementation and evaluate trainees; but, are not as involved in content development. Trainer development, including training of trainers, receives increased attention. Training support extends beyond scheduled sessions with regular informal information exchanges. Social media plays a crucial role in communication, especially for last-minute changes. Electoral training with mobile phone applications is being developed and used with success. Training is becoming more self-reliant and on-demand, complementing scheduled group learning. Diversification of training aids and incorporation of hands-on training with simulations and scenarios are observed. Soft-skills training is essential in addressing challenges like political polarization, pandemics and tense contexts. Educational ecosystems expand to include training for security personnel, political parties and health workers.

Training evaluation remains a challenge; but, multiple approaches provide valuable data points for improvement. External evaluation of training programs and trainers conducted by audit or survey research companies add value to assessments conducted by the training entities through internal channels.

Strong project management is essential due to the complexity and scale of training. Effective administration of the training programs is as important as the content of the training or its delivery method. Special coordinators at the central or regional and district levels are introduced to make administration of the training programs more efficient.

Improvement of electoral training often requires EMBs to ask for allocation of additional funds which is not always possible. Alternative sources of funding are explored by training entities, including fees paid by political parties and nongovernmental and international donor organizations.

Recommendations

Research findings give the possibility to the Ukrainian CEC to learn from experience of other countries and build their system of electoral training. There are a few considerations of the authors of this report research that may be useful for the Ukrainian CEC.

- **Foster Continuous Learning and Capacity Building.** Cultivate a culture of continuous learning and capacity-building. Emphasize professional development and provide opportunities for election officials and other stakeholders to enhance their skills and knowledge. Trainings should move away from singular “one-size fits all” content and approaches to cater to more areas, including soft skills development.

- **Continue Development of the Training Center.** Support development of a centralized, independent training entity – a learning HUB - with a large mandate, a defined strategic vision and plan and a strong pool of trainers based on regional representation. Empower local authorities to become logistics support units for training activities in the regions.
- **Embrace Technological Innovations.** Emphasize integration of technology in electoral training practices. Develop and promote e-learning platforms, online resources and digital tools that provide accessible and interactive training opportunities and assist in managing the training function. Ensure these platforms are user-friendly, offer self-paced learning options and accommodate different learning styles. Invest in the development of innovative technological solutions to enhance the effectiveness and reach of electoral training programs.

- **Introduce Civic Education, Research and Evidence-Based Training Practices.** Encourage research and knowledge generation in electoral processes and training. Foster collaboration between academic institutions, research organizations and electoral management bodies to conduct research studies and analysis. Promote evidence-based practices in designing and implementing training programs. Disseminate research findings and incorporate them into training and civic education materials and curricula to ensure the training is informed by the latest knowledge and best practices. Establish mechanisms to gather feedback from training and civic education participants, trainers, and other stakeholders to assess the effectiveness of programs. Monitor and evaluate the impact of training initiatives and make necessary improvements based on lessons learned. Adapt training programs based on participants’ feedback, evaluation and emerging needs to ensure their relevance and effectiveness.
Introduction

Background

The International Foundation for Electoral Systems (IFES) in Ukraine implements technical assistance projects with the support of the United States Agency for International Development (USAID), Global Affairs Canada and UK Aid. Currently, IFES provides technical assistance to the Central Election Commission (CEC) of Ukraine in administering electoral processes through customized training of election officials and by providing expertise in critical areas of electoral reform. The Ukrainian CEC requested IFES Ukraine to conduct research and provide recommendations regarding the experience of other countries worldwide regarding capacity-building and training of election officials. This research will be used to inform improvements of CEC capacity-building focus and approach, improve the quality of its poll worker training program and assist institutionalization of the CEC Training Center and its training programs.

General Context

Training electoral officials is recognized as an essential process contributing to election integrity. The Code of Good Practice in Electoral Matters clearly stipulates that training be provided to election officials at all levels of election administration, including those nominated by political parties.1 Competence and professionalism of election officials is a globally recommended standard for election management bodies (EMBs) worldwide.

Research demonstrates that better-trained poll workers positively impact overall public perception of the quality and integrity of elections. Encountering competent and confident poll workers influences voter confidence in the accuracy of the ballot count and the fairness of an election. Poll workers who were more confident about their training were given higher ratings by voters. This shows a clear correlation between training poll workers and voter confidence in elections.2

Elections are an enormous logistical undertaking for a country, comparable in scale and complexity probably only to war. Thousands – and in some cases millions – of people drawn from a wide array of backgrounds need to be recruited and trained in a short period of time to perform an unbiased temporary duty.

The objective necessity to recruit and train a large number of people in a very short period of time makes this task especially challenging. For example, Elections Canada regards recruitment and retention of poll workers as the biggest logistical challenge it faces at each election. Part of this challenge is the training of more than 200,000 workers to serve 27 million voters across Canada in increasingly complex processes and mandating continuous improvement. Elections Canada’s experience is common across election management bodies around the world.

Training election officials, especially poll workers, is a unique undertaking around the world. Yet few cross-national studies have been conducted, comparing practices in training such large temporary workforces. Current research presents comparative examples and analysis of existing practices of training permanent and temporary election officials and staff contributing to eliminating the informational gap regarding electoral training and capacity-building.

About the Research

This research examines and understands the systems and practices of capacity-building and training in election administration used by different countries. It analyzes approaches taken by different EMBs and identifies and highlights best practices employed by selected EMBs in their capacity-building and training initiatives for election officials. It summarizes successful strategies, methodologies and approaches that have been effective in enhancing the skills, knowledge, and professionalism of election commission representatives.

Based on the findings, the research provides recommendations on potentially appropriate approaches to the professional development and training of election officials at various levels. These recommendations are based on identified comparative practices and solutions applied by selected EMBs.

The research team studied experiences and practices of independent EMBs in countries around the world, considering factors such as the number of election officials, the election administration system and the size of the country. Countries with experience practices in electoral training and capacity-building were also included in the study.

Table 1. 33 Countries Included in the Research

<table>
<thead>
<tr>
<th>Primary Countries (11)</th>
<th>Poland, Romania, Canada, Australia, Bulgaria, Great Britain, Brazil, Georgia, Moldova, North Macedonia and Mexico</th>
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<tr>
<td>Referenced Countries (24)</td>
<td>Afghanistan, Armenia, Bangladesh, Cambodia, Ecuador, Ethiopia, Fiji, Germany, India, Indonesia, Japan, Kenya, Liberia, New Zealand, Nigeria, Norway, Pakistan, Palestine, Philippines, Serbia, Sierra Leone, South Africa, South Korea and the United States</td>
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The research was conducted in three stages:

- **Desk Review.** The first stage conducted a comprehensive desk review of election legislation and practices of the EMBs in the selected countries, as well as training materials, training plans and methodologies. The review also included an analysis of available expert opinions, reports and resources, including those prepared by organizations such as IFES and the International Institute for Democracy and Electoral Assistance, or International IDEA.

- **Online Questionnaire.** In the second stage, an online questionnaire was distributed to representatives of EMBs responsible for training and capacity-building. Seven representatives from training entities responded to the questionnaire, providing insights into their practices and experiences.

- **In-Depth Interviews.** The third stage of the research conducted in-depth interviews with representatives from six training entities in Poland, Romania, Moldova, Georgia, Australia, Mexico and Brazil. These interviews gained deeper insights into practices, challenges and successes of these training entities.

By following this three-stage approach, the research team was able to gather comprehensive information on electoral training and capacity-building practices of the selected EMBs. The desk review, online questionnaire and in-depth interviews provided multi-dimensional understanding of the systems and experiences of these training organizations, helping identify comparative practices, challenges and potential recommendations for professional development of election commission representatives.
Electoral Training in Ukraine

Overview of the Election Administration System

Ukraine uses an independent model of election administration. The Central Election Commission, or CEC, is a collegial body and independent from other state authorities. It is authorized to prepare and conduct presidential and parliamentary elections, local elections and referenda. The CEC is guided by the law on the Central Election Commission, the Election Code and other regulations.

The CEC heads the system of election and referendum commissions established for elections or referenda. For presidential and parliamentary elections, District Election Commissions, or DECs, are formed several months before election day and are responsible for organizing and conducting elections within their districts, including establishing vote results. DECs are temporary collegial bodies that cease to function a month after election results are announced.

DECs form Precinct Election Commissions, or PECs, approximately two weeks before the election. PECs in all elections are primarily responsible for organizing the voting process and counting votes at polling stations. About 30,000 PECs are formed during each election. The number of citizens represented by PECs is about half a million.

The system of election commissions during local elections is slightly different. To prepare and conduct local elections, Territorial Election Commissions, or TECs, are formed within an administrative-territorial unit. In accordance with the administrative and territorial structure of Ukraine, there are regional, district, city, city district, village and settlement TECs, which also form PECs to organize voting and vote counting at the polling station. About 1,600 TECs have been formed in Ukraine.

The main difference between TECs and DECs is TECs are the main body within the administrative-territorial unit and they establish the election results DECs establish voting results in the district and send them to the CEC. TECs also differ from DECs in that their members serve continuously until the next local elections are announced, mostly for five years.

DECs, PECs and TECs are formed of Ukrainian citizens who are voters according to the Constitution of Ukraine and are nominated by political parties and candidates. The peculiarity of election commissions is that they are formed from regular citizens who are not professionals and work in election commissions only during elections.

Training Electoral Process Participants

The first expert discussions on improving the knowledge and skills of lower-level election commissioners and training formats began in the early 2000s. Then, international technical assistance projects and civil society began working with the CEC to improve and modernize the training of election administrators. Organizations such as the International Foundation for Electoral Systems (IFES), the Organization for Security and Cooperation in Europe (OSCE) and other international organizations conducted trainings for election commissioners just before elections. The CEC’s partnership with these organizations eventually led to establishing a transitional training center.

Until 2016, training electoral stakeholders, including election commission members, was mainly provided by international organizations as part of technical assistance in coordination with the CEC. The CEC played a coordinating role in the training process; it developed and distributed methodological materials for election
commission members and approved training materials developed by other organizations and projects. In addition, the CEC conducted seminars for DEC management.

To professionalize the staff of election commissions and other stakeholders, in May 2016, the CEC and IFES in Ukraine established a joint IFES-CEC Administrative Center for Training of Election Process Participants, or the Training Center. The Training Center is a set of information, intellectual, material and technical resources united for the activities of the CEC and IFES to organize training for election participants, improve the legal culture and study international experience in organizing and conducting elections. The Training Center was established by the Protocol on Cooperation between IFES and the CEC, and the Training Center operates on the basis of the Procedure for the Functioning of the Training Center, which is part of the Protocol.

The Training Center has three permanent employees. When organizing large-scale pre-election training, external consultants and regional coordinators are engaged to help administer the training process in certain oblasts (three to four oblasts per coordinator) and communicate with trainers. The pool of trainers who can be accessed to train election commission members totals 150.

All Training Center activities are funded by IFES as part of the implementation of international technical assistance projects, consistent with legislation of Ukraine. Training Center activities are directed by a CEC member, who is responsible for issues related to the organization of training for members of election and referendum commissions. Representing the CEC Secretariat, Training Center activities are coordinated by the Head of the Secretariat.

Training Center tasks include:

- Developing and updating of training programs, courses and materials on elections, including manuals, brochures and audio and visual materials;
- Organizing training activities for the CEC Secretariat and the State Register of Voters;
- Organizing training and conducting training for DEC, PEC and TEC members, employees of the State Register of Voters’ maintenance and regional administration bodies and specialists involved in the work of election commissions, including lawyers, system administrators and accountants;
- Developing methodological guidelines for representatives of political parties and civic organizations, judges, journalists, academics and teachers;
- Organizing and conducting training, based on the Building Resources in Democracy, Governance and Elections, or BRIDGE, methodology and seminars and conferences, roundtables and meetings;
- Developing a methodology and monitoring plan for evaluating electoral training programs for their improvement;
- Developing training programs for trainers, including necessary curricula and course materials. All training materials developed by the Training Center are officially approved by the CEC;
- The Training Center has conducted more than 2,200 events involving more than 150,000 participants, including 39 BRIDGE trainings for almost 1,000 people.

The CEC also cooperates with other international organizations that train electoral stakeholders as part of technical assistance on the basis of protocols and cooperation plans.

In parallel with the joint Training Center, advocacy for the CEC’s own training center resulted in the changes to electoral legislation.
With the adoption of the Election Code in 2019, the Law of Ukraine On the Central Election Commission was amended. It added Article 35(1), which states, “To ensure the fulfillment of the Commission’s powers to improve the legal culture of participants in the electoral and referendum process, the Center for Training of Election Process Participants operates.” The Article states that the Center is a legal entity of public law, and its activities are financed from the state budget, international technical assistance and other sources not prohibited by law.

In pursuance of this provision of the law, the CEC adopted Resolution Number 4 of January 14, 2022 on The Center for Training of Electoral Stakeholders, or CTES, according to which it approved the Concept for the Establishment and Functioning of CTES, established the CTES and approved regulations for CTES.

As of today, while the CTES is in the process of institutionalization, the joint Training Center of the CEC and IFES continues its activities, helping the CEC to fulfill its mandate to train electoral participants and perform tasks as defined by the CEC Strategic Plan for 2020-2025.

A CEC working group was established to prepare a draft Concept for the Institutionalization of the CTES. Working group tasks include determining the most optimal model for the Training Center, analyzing existing models of functioning educational institutions in election management bodies in other countries and their proportionality to CEC training needs.

**Methodology for Training Election Commission Members**

In Ukraine, training election commissioners is traditionally organized in person, immediately before elections and consists of three stages. The exception is the training of employees of the State Register of Voters which was administered several times during the inter-election period.

At the first stage, trainers are trained to master the curriculum developed by experts and approved by the CEC. At the second stage, the trained trainers are paired up to train mid-level commissions – DECs for parliamentary and presidential elections and TECs for local elections. At the third stage, the same trainers train members of PECs, the lowest level commissions. This approach can be characterized as a combination of the cascade method and the method of field teams.

Trainings for DECs and TECs, due to the relatively small number of commissioners (especially DECs), allow for a more interactive approach to training. Usually, representatives of one or two election commissions participate in the eight-hour training. In addition to a theoretical component, time is devoted to developing practical skills through group exercises. Training participants learn in practice the most important stages of the commission’s work, including: registration of candidates (TEC), formation of PECs, the procedure for establishing voting results (DEC and TEC) and the procedure for handling complaints.

PEC training, due to the large number of members of these commissions, is more like a lecture with the opportunity for participants to ask questions of trainers. Such trainings bring together 50 to 200 PEC members (mostly the PEC chair and secretary), are held in large halls and last up to four hours. However, even with a large number of participants, the training includes one practical exercise on vote counting and drawing up the relevant protocol. For this purpose, a PEC is formed from volunteer participants, which should recreate the vote counting and protocol procedure step by step, with the help of trainers. All other participants act as observers.

Trainings for election commissioners are often attended by international observers. In their reports, observation organizations such as the OSCE generally provide a positive assessment of the comprehensiveness, interactive nature of the trainings, participation of participants and training materials. At the same time, factors that negatively affect the effectiveness of the trainings are emphasized, including:
Lack or insufficient availability of transportation in some regions to travel to the training venue;

Frequent changes of commission members – especially management – before election day, which leads to members lacking appropriate training working on election day.

The Training Center and the CEC develop and approve training materials that are delivered to each election commission. With the help of these materials, election commission members can prepare for elections without attending trainings. These materials include training manuals for each level of commissions, step-by-step instructions on important procedures and information posters. These materials are also published on the CEC website and through other information resources. Before each election, the Training Center produces a training film for election commissioners which is conveniently divided into short videos on specific topics. Such films are used during trainings, distributed among commission members on disks or flash drives and published on the Training Center’s YouTube channel. During the 2020 local elections, the training film was even broadcast on television channels. Examples of such training films are available at https://www.youtube.com/@user-gs1zh4zn5z/featured.

Due to the coronavirus pandemic, the training campaign for the 2020 local elections was conducted online using the ZOOM video conferencing software.

Due to the new format, the training program for trainers had to be adapted. In addition to traditional sessions on electoral procedures, sessions on acquiring ZOOM skills, the ability to control the audience during online training and other features of online training became equally important.

Despite the online format, the TEC trainings used an interactive methodology: Division into groups in separate ZOOM rooms and group exercises. The trainings for PECs were conducted in the format of online seminars when commissioners drafted questions in the chat.

Online training allows participants to take the training regardless of where they are and not spend time and money traveling to the training venue. On the other hand, the practice of using this format has demonstrated a low level of computer skills of the participants which negatively affected attendance.

**Monitoring and Evaluation**

During all trainings, participants are tested at the beginning and end of the training. This measures effectiveness of the training by determining the level of improvement in knowledge of the participants after the training session. Participants are asked to indicate how useful they think the training was for them and about the knowledge and skills they have acquired in their work as a member of an election commission.

Representatives of the Training Center, IFES and the CEC also monitor trainers. During the training campaign, travel and monitoring schedules are formed so that at least one monitor visits each pair of trainers at least once. Based on the monitoring results, a report is generated for each trainer, assessing his/her skills according to certain criteria: Knowledge of election legislation, completeness of answers to questions, audience management, ability to use trainer resources (presentation, handouts and the training scenario), ability to organize practical work and the ability to work in pairs. Evaluation results for each trainer is taken into account when hiring trainers for the next training campaigns and may be the basis for immediate replacement of the trainer if necessary.

After the election process is completed, conferences and roundtables are traditionally held to learn lessons from the training. Such events are attended by representatives of the CEC, IFES and other international organizations, representatives of the Training Center, members of election commissions who participated in the training, representatives of political parties and other election participants. Conclusions and recommendations from these events are taken into account when planning the next training campaigns.
Needs and Gaps

Based on the results of election training roundtables and conferences we can outline issues that negatively affect the process of training election participants:

- Ambiguity and complexity of election legislation. Discrepancies, contradictory norms and gaps in the legal framework for elections;

- Frequent changes to electoral legislation, often just before elections when all training programs are completed;

- Frequent replacement of election commission members just before elections. The scale of replacements on average reaches 40 percent which has a negative impact on commission member training;

- Inability to train all election commission members due to their large number;

- Lack of systematic training for other election process participants other than commission members;

- No requirement for mandatory attestation and certification of commission members before their appointment; and,

- Low level of remuneration of election commission members, which does not cover training time.
Structural and Institutional Aspects of Electoral Training

Organizing electoral training largely depends on the type of EMB. Governmental EMBs usually have their electoral training embedded within a bigger system of training and professional and personal development of public servants and rely on local public authorities to conduct training of the temporary, or polling station, staff. Independent EMBs must develop their own training systems for election officials, separate from government.

Electoral Training Framework

In countries with independent EMBs, training and capacity-building of election officials are typically regulated by electoral laws or an Electoral Code of the country. These laws outline EMB functions and responsibilities, including provisions related to training and professional development.

EMBs often have internal documents such as regulations, instructions, strategies and plans that guide their operations and define staff training. These internal documents may include:

- **Regulations and Policies.** EMBs may establish regulations and policies that outline the objectives, scope, and methods of training for their staff. The Regulation of the organization and operation of the Permanent Electoral Authority (AEP) of **Romania** clearly specifies AEP’s responsibility to train election officials and indicates which departments are responsible. Policies may cover initial training for newly recruited personnel, gender mainstreaming or inclusion-related aspects of electoral training. For example, the **Georgian** Center of Electoral Systems Development, Reforms and Trainings administers its activities in line with the Gender Equality Policy adopted by the Georgian CEC. **Mexico** enjoys protections in their General Law of Electoral Institutions and Procedures and Internal Regulations. These statutory instruments govern the Executive Directorate of the National Electoral Professional Service, responsible for the permanent professional workforce; and, the Executive Directorate of Electoral Training and Civic Education, responsible for poll worker training and public outreach. Further references to Mexico in this study will seek to clarify different audiences.

- **Strategic Plans and Strategies.** EMBs often strategize to ensure systematic and continuous capacity-building. Electoral training reforms in **Moldova** were adopted via the strategy of training election officials and voter civic education for 2008-2013. Creation of the Moldovan Center for Continuous Electoral Training was part of this strategy, realized in December 2011. Other examples of this kind of document include the Strategic Plans of the **Moldovan, Georgian, Mexican** and **North Macedonia** electoral commissions, the **Australian** Electoral Commission Corporate Plan, strategic and action Plans of the Moldovan and Georgian Training Centers and Election Integrity Management Plans of Romanian and Georgian electoral authorities.

- **Standard Operating Procedures.** EMBs may have standardized operating procedures that include provisions for training and professional development. These procedures ensure training consistency and help maintain high standards in electoral administration. An example can be a procedure for the selection and certification of trainers for the pool of trainers or the evaluation and certification of election officials at different levels in **Moldova** and **Georgia**.

- **Training Plans:** These are important documents, which identify the target audience for training programs, define training methodologies and set implementation timelines.
Institutional Diversity of Training Organizations

Placing the training function within the researched EMBs varies from one institution to another. It is difficult to classify different practices into categories; however, common features of how the training systems are built in different countries can be observed.

Training is conducted by different EMB departments

Training is placed in one or spread among a few EMB departments. This is the case for Brazil, Romania, Canada, Mexico and Poland. In Romania, training functions are spread among five departments, electoral authority branches, and regional offices. The Department of Control of the Financing of Political Parties and Electoral Campaigns is responsible for training political party representatives responsible for political finance; the electoral organizational support department is responsible for training election officials (mostly electoral authorities); the Classified Information Protection Service offers training to those who have access to personal or classified information; General direction and General administrative direction and public procurement are responsible for the logistical and financial training elements; and, regional offices represent the main workforce tasked to organize and conduct training workshops in their areas.

In other cases, the location for a training entity is within an operations or procedures division of an EMB. This is the case in Palestine where the training division is located within the Electoral Procedures department. In Poland, the main training function is placed in the Legal and Election Organization Department of the National Electoral Commission and spread over regional and district offices responsible for design and conduct of training workshops in their areas. In Brazil, training is conducted by the electoral authority’s human resources department. Returning officers (ROs) in Election Canada conduct hiring and training of election workers. To support them, ROs must also hire Training Officers (TO) at the beginning of the election period. TOs prepare and train poll workers to serve at the advance, ordinary, and long-term polls, ensuring that all electors receive the same quality service. Despite the decentralized training structure, EMBs in Brazil, Mexico and Canada have centralized control over the training curriculum, while in Poland there is more freedom at the local level.

Training is conducted by one department having different functions

Training is placed in the training department that combines other functions. Such a structure we can find in Bulgaria and North Macedonia. Election authorities of both countries have bigger departments that combine international relations, protocol, public relations, training and civic education. In North Macedonia, training tasks are allocated to the Sector for Continuous Training, Public Relations and International Cooperation. The Sector is composed of three departments, only two of which are directly charged with training and education: The Department for Informing the Public and Education of Citizens and the Department for Continuous Training.

Training is conducted by a specialized EMB department

Electoral training is designed and conducted by one department. The best example in this category is the National Training and Education Unit (NTEU) of the Australian Electoral Commission (AEC). In the AEC organizational charter, the unit is placed under the People’s Branch of the Enabling and Regulation Group. It is seen as the central nucleus of education for the whole organization. The same is true for the International Institute of Democracy and Election Management (IIIDEM) established by the Election Commission of India (ECI) to advance professional election management. The Institute, despite its title, is considered one of the divisions of ECI.

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3 Electoral Expert’s Corp is a roster of Romanian citizens eligible to be selected by lot as heads and deputy heads of polling stations. The roster is managed by the Permanent Election Authority of Romania and is based on results of the exams following attendance of the online training program.

4 Federal Elections in Canada are delivered by Returning Officers. Each electoral district has one RO who is responsible with the support of Elections Canada headquarters to organize, deliver and control federal electoral events in that district.
As outlined under the legal framework above, Mexico has two directorates that administer training, one for permanent professional officials and another for poll workers. Each directorate has a distinct area of responsibility and approach, yet complement each other during elections. During that time, the Directorate for the National Electoral Professional Service works with the Directorate of Electoral Training and Civic Education to train the instructors that provide training of poll worker trainers, ensuring a harmonized curriculum. The Mexican National Electoral Institute has regional and district representation offices: Thirty-two regional Offices for Electoral Training and Civic Education and 300 District Committees for Electoral Training and Civic Education.

**Training is conducted by a specialized body created by the EMB**

This model became one of the trends for independent EMBs. There are over 30 independent training centers founded by election authorities around the globe. The well-known ones in Europe are the Georgian Center of Electoral Systems Development, Reforms and Training and the Moldovan Center for Continuous Electoral Training. Both institutions were founded by the countries’ CECs; but, have autonomy and separate budgets and leadership. The institutions’ mandate includes electoral training provided to permanent and temporary election officials, staff of election management bodies and other electoral stakeholders such as local government, political parties, civil society and the media. Civic education is provided to youth, persons with disabilities and women. Election-related research is conducted to ensure evidence-based civic education and electoral training; and, election officials are certified – required by law as a condition of being nominated to lower-level election bodies.

Institutionalizing electoral training selected by a country depends on EMB strategic objectives and its vision; but, also on budget and the number of election officials and other stakeholders. In many cases, the system is in constant development. In Moldova training in specific areas, such as political finance is conducted by the specific CEC department. The Australian Training and Education Unit in the past reported directly to the Deputy Electoral Commissioner and had access to the Electoral Commission’s activities and strategy and also enjoyed executive support which helped them implement a successful, impactful structure.

Currently, the Training and Education Unit is changing from directly reporting to the Deputy Electoral Commissioner to being embedded in the organization’s People Branch. North Macedonia is moving toward a centralized model of electoral training through creation of a stand-alone training department which would have training, civic education and training research functions. The Romanian electoral authority is taking steps for consolidation of its training capacities and professionalization through the creation of a pool of trainers drawn from the authority’s regional and district representatives.

**Mandate and Employees of Training Organizations**

The training organization mandate reflects official authorization, responsibility, and scope of activities. It outlines the specific tasks, functions, and objectives the organization is empowered to pursue within the election administration process. Decentralized and less institutionalized electoral entities typically have a limited mandate and limited possibility to extend the mandate based on the needs of the electoral process. These organizations may have other responsibilities unrelated to their training duties, such as logistics, election administration and public and international relations. Entities with greater autonomy embrace a broader spectrum of tasks and responsibilities in their mandates. It refers to training other categories of stakeholders such as political party and civil society activists, teachers and librarians with responsibility to civic education, voter information; research and international programs.

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Different mandates are:

- The mandate of the training organization in **Poland** is limited to training provided to poll workers during the electoral period.

- The **North Macedonian** training entity is slated to add research responsibilities to its mandate as well as increased training between elections.

- Training centers in **Moldova and Georgia** have responsibilities including training and certification of election officials, training of other stakeholders, civic education, research and training consultations electoral matters.

- Similar to the certification mandate is the duty of training officers at **Elections Canada** to dismiss appointed poll workers based on their evaluation results and in coordination with the Returning Officer.

- The **Australian Training and Education Unit**, besides implementing a large electoral training program, also extended into civic education programs.

- The **Indian Institute** is well known for its in-country training activities, strong research component and international programs for EMBs around the world.

The training entity mandate shapes the organizational charter, status and tasks of its staff who are usually permanent staff, or core team; temporary or part-time workers; and, a dedicated pool of trainers.

**Core Team**

Training entities’ internal organizational structure in the researched countries differs; but, there are similarities. As an institutional department of an EMB, the training entity is usually led by a director or head of department and a deputy. Being autonomous, the training centers from **Moldova and Georgia** have their own administrative structures, including an accountant responsible for corporate budget and financial operations, a lawyer responsible for internal documentation and procurements, an information technology specialist responsible for digital security and network maintenance and functioning of the corporate website, a driver for daily transportation needs of the staff, and a cleaner to maintain the office. In **Moldova and Australia**, some of these positions are outsourced such as the information technology specialist and the driver, while in other training entities, these functions are spread among different EMB departments.

The core team is usually made of curriculum and materials writers; trainers and facilitators; Learning Management System administrators (**Australia**), certification specialists and project managers (**Georgia**). Employees of the decentralized and semi-centralized models, besides their training-related responsibilities, usually have other tasks concerning election management, international relations and communication. In **Romania**, only five out of 10 employees of the electoral organizational support department are directly concerned with training election officials.

These five employees, including the department’s director, have additional responsibilities besides training. In **North Macedonia** the Sector for Continuous Training, Public Relations, and International Cooperation was severely understaffed, which required representatives of the training unit to act as spokespersons for the election commission and perform other duties related to international relations and communication. Training departments and training centers have their staff focus on training and education-related activities. The more staff they can support, the more diversified positions they have. Thus, the training center in **Moldova** has five out of their nine employees as trainers, providing training between elections.

These five trainers have specific areas of responsibility such as development and coordination of education and training programs, coordination of the training center’s research, online training, communication and civic education. The same trainers are also coordinators of training activities before elections.
In contrast, the Australian National Training and Education Unit has 40 employees, of which 10 are trainers and 12 educators; but, deploy administrators of the learning management system and curriculum writers. Mexico has a staff complement of 25 people in the Directorate for the National Electoral Professional Service, while the Directorate of Electoral Training and Civic Education employs 77 staff members. Mexico, with its heavy reliance on their learning management system for the professional staff, has a strong instructional design team, as well as learning management system management.

Poll worker training depends on multiple mobile phone applications, or apps, and the training department has expertise that extends to that area. The latest trend is the growing need for permanent ICT-skilled staff in the structure of electoral training entities. Some of the researched EMBs indicated they would need webgame designers, video editors, graphic designers and artificial intelligence (AI) specialists.

**Pool of Trainers**

None of the training entities is able to deliver a national-scale training program without engaging additional staff. While some EMBs rely only on regional and district election officials (Poland), others create a pool of professional trainers to conduct training programs designed by the training entities.

**North Macedonia** invested heavily in a new approach ahead of the 2019 elections, designating election trainers and putting them through a Training-of-Trainers program. This built confidence of electoral trainers and assisted them with confidence in the workplace. Use of Viber as a communications platform was an excellent tool for addressing issues and promptly solving problems.

While the Training of Trainers program was considered invaluable, social media platforms served as a critical tool. This is of particular use when laws or regulations are amended late. Materials can be changed within 24 hours, alerts pushed out via Viber and new briefings held with trainers and updated training sessions organized with poll workers if necessary. However, networking of election trainers via Viber, seen as a need for sustainability of the training corps, is also an acknowledgment of limitations resulting from small headquarters-based team and lack of resources. The investment in a training center is seen as a means to improve future sustainability and continuous learning.

Since 2020, **Romania** has placed a specialized effort on trainer development by introducing an official training certificate, ensuring that two professional trainers are in place in each county (Bucharest and 41 counties). These officials perform other local public service duties and 84 trainers were drawn from a possible pool of 200 staff members found in all counties, relying on knowledge of electoral matters and the ability to communicate simply and clearly. The training certificate then complements a skill-based recruitment process by developing the training skill set among the selected individuals. This helps keep experienced officials engaged; those who had struggled with the same content used repeatedly in the past. **Canada** and **Australia** hire election trainers with adult education backgrounds, using them to train poll workers. **Australia** pairs these trainers with experienced electoral officials during the first few sessions to ensure training quality.

**Mexico** hires poll worker trainers for each election. Some of these trainers are new and some have previous experience as supervisors or trainers. More than 7,000 electoral supervisors are hired to oversee the 42,616 electoral trainers used to train poll workers. Each trainer is allocated four polling stations to manage and follows a two-step training process. In the first step, using a lottery system, 12.8 million voters (13 percent of registered voters) are identified and visited by trainers for about 30 minutes to recruit them as poll workers. Out of those visited, a second lottery results in just over 1.5 million selected as poll workers; and, then in the second step, receive training. Recruiting future poll workers, in a heavily polarized political context, is seen as a major challenge going forward.

**Serbia** has recently, with IFES support, undertaken an investment in developing trainers’ skills and creating a pool of trainers. **Brazil** recognized that trainers require more capacity and the Superior Electoral Court strengthens the capacity of multipliers through targeted training to maximize the hybrid model of online
and in-person training with a full course on training methodology to be offered in 2023. **Canada** requires its electoral trainers to complete an online self-training course available on the Virtual Training Centre system and the Training Officer Reference Guide. Training officers must practice delivering poll workers sessions by conducting dry runs, which should be attended by the local Returning Officer and other office staff. **Mexico** conducts a 20-hour long training over two to three days for all 50,000 supervisors and trainers they use for training poll workers. **Georgia** and **Moldova** also rely extensively on trainer investment ahead of elections.

### Table 2 Number of Trainers Included in the Pool (temporary staff)

<table>
<thead>
<tr>
<th>#</th>
<th>Training Entity/Country</th>
<th>Number of Trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Canada (EC department)</td>
<td>338</td>
</tr>
<tr>
<td>2</td>
<td>Australia (training unit)</td>
<td>84</td>
</tr>
<tr>
<td>3</td>
<td>Moldova (training center)</td>
<td>About 30</td>
</tr>
<tr>
<td>4</td>
<td>Georgia (training center)</td>
<td>Over 250</td>
</tr>
<tr>
<td>5</td>
<td>North Macedonia (training department)</td>
<td>124</td>
</tr>
<tr>
<td>6</td>
<td>Romania (AEP department)</td>
<td>84</td>
</tr>
</tbody>
</table>

Training centers sometimes hire assistants to help with training logistics such as packing and distributing materials, transporting equipment and arranging the training room. Assistants support the work of the trainers in **Romania**. Such a practice existed in **Moldova** for some time, but was changed to conduct training in pairs by two trainers who are responsible for both training logistics and implementation. This practice is common.

The **Australian** training unit uses three or four trainers, which is required by the complex nature of the training exercise. Volunteers can also be part of the training preparation by translating training materials or helping with logistics. The **Moldovan** Training Center is registered at the Ministry of Education, Culture, and Research as a volunteer hosting institution. Training center volunteers help more with civic education activities; but, also are involved in translating online training materials from Romanian into Russian and logistics preparation work in the electoral period.

### Outsourced Functions

Some of the specific positions and functions, which require specific knowledge and qualifications, are outsourced. The monitoring and evaluation specialists’ function in **Moldova** is outsourced during the electoral period to a public opinion research company. In **Georgia**, the Training Center may hire a psychologist specializing in communication strategies to develop training materials or conduct a training workshop. **Mexico**, for the training of their 3,226 professional staff, accesses academics to craft their structured training courses, using their internal instructional designers to prepare the content for online learning.

### Electoral Training Entities and the Electoral Cycle

Capacity-building and training in elections can occur at various stages of the electoral cycle. The specific timeframe and frequency of capacity-building initiatives and training workshops depend on context, resources and needs of EMBs and stakeholders. Capacity-building and training efforts can be conducted in the following ways:

- **Continuous Training** entities in **Brazil**, **Moldova**, **Georgia** and **Australia** consider that, for greater efficiency, training should be offered on a continuous basis. They offer training to enhance knowledge, skills, and competencies of election officials and stakeholders at all stages of the electoral cycle.
This continuous training covers topics such as electoral laws and regulations, electoral procedures, voter education, election technology, data management and electoral administration. For workshops offered between elections, training entities usually do not employ supplementary staff such as trainers or assistants. Mexico, for their professional staff members, administers a three-year structured training program, built around a staff position, identified competencies and level of experience. The three-year program consists of basic, specialized and elective training modules. Each module is roughly 60 hours in length, is completed during and after work hours and is compulsory for all staff. This is administered entirely via their online platform, which allows for access at any time.

Georgia uses an online learning platform, funded by the Council of Europe, which is also used to train the Bureau of Public Servants and the government has collaborated with all ministries to train local public servants with more than 30,000 trained to date. Elections-related content is removed during non-election times to prevent out-of-date content circulating in the interim period. In South Africa, an online public learning portal was launched in May 2021 and is open to the public. Eight modules are available for learning, using the South African identity number as a log-in^6 and focuses on the following topics: About the Electoral Commission, Voter Registration, Special Votes, Voting, Counting, Voter Education Material, Observers and Performance Management. Training entities in Poland, Bulgaria, North Macedonia and Romania target pre-election training.

- **Pre-Election Training:** Training and capacity-building efforts are often intensified in the period before elections. At this stage, training entities offer targeted training programs for election officials, political parties, candidates and civil society activists. The purpose is to ensure that all stakeholders involved in the electoral process understand their roles and responsibilities, electoral laws and procedures. Training may also cover voter registration, campaign finance, voter education and election technology.

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^6 The identity number is used at Electoral Commission e-learning portal (MyIEC) as a unique identifier and tracker for election officials to take the e-learning courses. It reveals the courses taken by the election official, progress and other details per the individual.
Methodology and Modalities of Electoral Training and Capacity-Building

Introduction

Training election officials, including poll workers, has evolved in response to changing election practices, advancements in technology and a growing emphasis on efficiency, accuracy, and inclusivity. While the core principles of poll worker training, such as a strong emphasis on legal provisions, remain consistent, there have been notable developments over time. Here are aspects of the evolution of poll worker training in terms of methodology and modalities.

1. Increased Emphasis on Election Laws, Complex Scenarios and Procedures

- Historically, poll worker training primarily focused on basic duties, such as setting up polling stations, checking voter eligibility, assisting with voter registration, processing voting and vote counting.

- With the expansion of election laws and regulations, training has become more comprehensive, ensuring poll workers are well versed in specific legal requirements, procedures, and voting rights, along with their nuanced application in different scenarios.

- Training now includes instruction on handling provisional ballots, verifying voter identification, understanding voter privacy laws, ensuring vote secrecy in the age of mobile phones and following prescribed protocols for handling emergencies or irregularities.

2. Technological Integration

- Introduction of technology has transformed poll worker training. Training programs now incorporate instructions on using electronic poll books, voter identification systems, electronic voting machines and technology-driven systems such as results transmission.

- Poll workers are trained to operate and troubleshoot voting equipment, ensure its security, and address technical issues that may arise during the voting process.

- Training may also cover the use of digital tools for voter registration, data management, basic data analytics, reporting and results transmission.

3. Voter Accessibility and Inclusivity

- As awareness of voter accessibility has increased, poll worker training has evolved to address the needs of diverse voters, including those with disabilities, limited local language proficiency, limited literacy, or other special requirements in conflict displaced communities.

- Training programs now emphasize the importance of providing accessible polling places, assisting voters with disabilities, offering language assistance and accommodating special circumstances.
Poll workers receive guidance on effectively communicating with diverse voters, maintaining a welcoming environment, and ensuring equal access to the electoral process.

4. Election Security and Integrity

- Recent concerns about election security and integrity have led to enhanced training measures for poll workers such as de-escalation of tensions or working closely with local security officers.
- Training programs now include modules on identifying and preventing potential security risks, understanding cybersecurity best practices, safeguarding voter information and following protocols to protect against tampering, fraud or accidental loss of equipment or ballots.
- Poll workers are trained to be vigilant, report suspicious activities, and adhere to strict protocols to ensure the integrity of the election process, maintain the chain of custody related to ballots and voting equipment and ensure health and safety of other poll workers.
- Poll workers are also asked to monitor their own social media feeds, guard against disinformation, and become more well-versed in protecting information integrity.

5. Training Delivery Methods

- Delivery of poll worker training has evolved alongside advancements in technology and changing learning preferences.
- Traditional in-person training sessions are often supplemented by online training modules, webinars, or blended learning approaches.
- Digital training materials, videos, and interactive modules are used to provide consistent and standardized instruction, accessible to a geographically dispersed pool of poll workers.

6. Continuous Education and Recurring Training (primarily for the permanent workforce)

- To keep up with evolving election practices, some jurisdictions now implement recurring training programs, ensuring poll workers receive regular updates and refreshers on their roles and responsibilities.
- Ongoing education and training help polling officials stay informed about legislative changes, new procedures and emerging best practices – such as risk management – within the country and globally.
- Online learning portals have made delivery, distribution, and scheduling continuous learning easier.
- The evolution of poll worker training improves the election process, increases voter confidence and maintains the integrity of democratic practices.

Poll Worker Training Content

Given the legislation-driven nature of elections, training content continues to focus on breaking down legal provisions into user-friendly, digestible pieces. In almost all instances of poll worker training delivery, the role of headquarters staff in structuring the primary training materials is paramount. In reviewing the content of training manuals from 32 countries across 42 elections across the globe, the following content structure appears standard for most poll worker training manuals.
1. Electoral Law
2. Electoral Administration and Roles
3. Pre-Polling Procedures
4. Polling Procedures
5. Closing Procedures
6. Counting and Results Tallying
7. Complaints and Objections
8. Annexes: Polling materials, examples of invalid votes and packing of materials
9. For the COVID-19 pandemic, health safety protocols were added in many manuals

Abovementioned content structure is often broken down into modules. For example, Australia relied on six online modules via their learning management system that can be completed at trainees’ own pace and schedule, with only the senior-most categories of poll workers, such as polling station managers, invited to mandatory face-to-face training. The training covered the following modules:

Duration of face-to-face training differs from country to country. Romania, Moldova, Brazil, Mexico and Poland indicated one to four hours (half day), Georgia five to eight hours (full day), North Macedonia reports trainings last one (five hours) to two days and training in Australia extends three days. The duration is affected by budget, content, class sizes, time availability, methodology of delivery and introduction of major reforms technologies and procedures. Countries like Brazil and Mexico offer additional training beyond the in-person sessions mentioned above. This is discussed in more detail below.

It has become commonplace for EMBs to augment content with guidance for the trainer and facilitator, either in the form of a separate guide, or supplementary notes in learning aids such as slide decks. Fiji offers a separate trainer’s guide covering planning for training, training resource and preparation checklists, training administration, scripted lesson plans with detailed guidance of training sessions, ideas for icebreakers and energizers and quizzes and training assessments. Australia and Ethiopia follow a similar scripted lesson plan approach.

**Learning materials have expanded**

Learning materials for poll worker training normally consist of a training manual, training videos and a slide deck for in-person training. Every EMB reviewed generally depends on a training manual or handbook of some kind as its primary source of training material. This universal source document carries varying levels of sophistication and user-friendliness. Some are simply verbatim versions of the law. However, these are in the
minority. Most training handbooks for poll workers tend to use simpler language, use graphics to illustrate complex situations and can easily lend themselves to independent use at home and the polling station.

Greater interactivity in the handbooks is encouraged by quick quizzes and scenarios between chapters, encouraging assessment and reflection along the way. This helps knowledge retention and considerations for real-life application. Monitoring usage of materials becomes important. Australia tracks receipt of training materials such as the handbook, along with other evaluation means. Brazil, in using its online application, is able to track the usage as poll workers access the online version of the training manual, as well as quizzes to test trainee knowledge.

Handbooks on their own are not enough. Simple, relevant, and well-designed job aids such as worksheets or infographics showing workflows, checklists and field-tested forms can play a significant role in complementing training manuals. Job aids are instruction-focused and need to use short sentences and words that start with verbs, spelling out exactly what should be done. Manuals must be designed for use in polling places, ensuring greater usability. Mexico, for example, is concerned about the increasing length and complexity of training materials and hopes to make their materials more visual and less text driven in future. Familiar fonts, legible font sizes (at a minimum of 12 point), consistent font variations and colors and contrast for headings and captions, line spacing, appropriate use of white space, and bold text for important information are among useful design elements to improve training materials.7

Ultimately the goal of training handbooks is simplicity of use and understanding. This contributes to greater interactivity in the classroom context as well. Despite this shift to greater interactivity, slide decks, such as Microsoft PowerPoint, remain the mainstay of learning materials to complement the standard training manual. Slide decks have been used more creatively, relying on more than simple text on slides. In the United Kingdom for example, a slide deck of about 50 slides serves as the primary training aid. This slide deck goes further and uses the “Notes” section of the deck to integrate important lesson planning elements, such as objectives and talking points. With careful trainer guidance on content, the “Notes” section covers objectives, references to needed materials, critical points to emphasize and troubleshooting guidance if the poll worker encounters problems. Videos are embedded in the slide deck in sections that relate to voters with learning or sight disabilities. These videos were produced in conjunction with organizations supporting the disabled community and, in the process, complements the trainers’ classroom efforts.

The standard multi-media complement to slide decks is usually training videos. In Mexico, the training of poll workers lasts for a minimum of two hours. Given the fact that training content is becoming longer and longer, but time that the classroom-approach is limited, additional learning materials are used. Videos are also used during training and poll worker trainees, when surveyed, rated training videos as the most appreciated learning aid. Romania, in response to the COVID-19 pandemic, introduced video simulations and these were shared with 80,000 officials across the country via mobile phones. The video clips were ten minutes in length for easy distribution and were also shared with political parties for the training of their activists. This production of short videos and their distribution via a mobile phone was also adopted by Nigeria in 2019 when poll worker training had to be refreshed following the last-minute postponement of elections. South Korea heavily relied on training videos with the outbreak of the COVID-19 pandemic to train poll workers.

Drafting materials

Kenya set up master trainer working groups where trainers come together to generate material and contribute their experiences to the materials development process. Countries that have just emerged from conflict, such as Ethiopia, relied entirely on developing materials by the international community at the headquarters level. Recruitment of facilitators presents significant challenges in training these inexperienced trainers. Support, via mechanisms such as central call centers, are an integral part of supporting these trainers in the rollout phase.

7 https://civicdesign.org/fieldguides/effective-poll-worker-materials
Consultation and engagement with stakeholders also take on many different formats, especially in the post-election period that immediately follows election day. The UK Electoral Commission follows a close consultative process in its work: For example, developing performance standards and training manuals and associated training aids such as slide decks. The UK Electoral Commission develops guidance in consultation across the electoral community including the Society of Local Authority Chief Executives, the Association of Electoral Administrators (AEA), the UK Electoral Coordination and Advisory Board, the Elections, Registration and Referendums Working Group, the Electoral Management Board of Scotland, and the Welsh Electoral Practitioners Working Group. The training is delivered by local officials, trained in conjunction with the AEA. The AEA works with local authorities and trainers to customize materials to the local context, lessons and priority areas. The AEA has a specialist electoral training manager who supervises this process.

**Elections don’t become easier**

Elections seldom become easier and there is temptation for longer trainings and bigger training manuals. For each election, temporary election staff work in an environment of increasing workloads, complexity, scrutiny, expected levels of assurance, and in some cases, threats against them as individuals. Some of these complexities result in increasing points of vulnerability across election day, during which there are ten or more critical moments where election integrity could be compromised and require additional training. The IFES-identified “stress points” overlap with those identified by scholars. These are typically as follows, sequentially across Election Day.

- Opening of polling: Organizing and setting up the polling place and early morning rapid startup
- Ongoing: Assisting voters with disabilities
- Ongoing: Assisting eligible voters: Not on register and no requisite identification
- Ongoing: Assessing ineligible voters: Inked already and insistence to vote
- Close of polling, packing up
- Reconciliation of ballots, inventorying ballots and other materials
- Start counting ballots
- Ongoing: Resolving Questionable Ballots
- Results compilation: Reconciling counts from voters register, ballot count and unused ballots
- Securing and returning materials to election office

Reconciliation, which requires the highest levels of accuracy and forms the basis of counting ballots, has been shown to be a constant weakness in the entire electoral process, despite it being a theoretically simple process. Additional stress points can include election day equipment failure; disinformation targeting the electoral process, polling locations, voters or individual poll workers; and, election-related violence threatening the safety of infrastructure, equipment, poll workers and voters. While these stress points differ from election to election, each of these moments – across a 18-24-hour window of continuous work –represent vulnerabilities, or stress points, where the electoral process can break down or be subject to accusations of favoritism or bias, thereby endangering the integrity of elections.

Each one of these processes is subject to careful legal language, crafted to ensure complete neutrality, secrecy and transparency in the exercise of the electoral process. This implies there is no room for discretionary interpretation or performance and a very slim margin of error in getting things wrong. It also

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8 [https://link.springer.com/content/pdf/10.1007%2F978-3-319-20376-8_50.pdf](https://link.springer.com/content/pdf/10.1007%2F978-3-319-20376-8_50.pdf)

implies these stress points represent potential moments where conflicts need to be resolved as opposing party representatives or voters make claims of noncompliance with the law and accuse the EMB of bias or even call the validity of the election results into question. However, only a few EMBs are starting to clearly address these vulnerabilities as an issue, with only 43 percent of those surveyed reporting targeted training on a variety of vulnerabilities.

The long working day is also more complex when more ballots are introduced. In the 2019 election in Indonesia, hundreds of poll workers are reported to have died from fatigue-related illnesses and thousands reported falling sick due to long-work days, stress and comorbidities. In the world’s largest single day election, five ballots amounting to more than 900 million were administered to 192 million citizens at more than 805,000 polling stations by 7.3 million poll workers in a six-hour Election Day. This represented the first time that Indonesia had ever combined this number of ballots in a single election. Previously, the presidential and vice presidential elections were separated from the legislative, regional and local elections. The 2019 elections saw an entirely manual tabulation after the vote and this was heavily criticized as being too complex and resulting in an additional 24 hours of functioning for poll workers.

Comparative Examples of Stress Points

The United Kingdom Electoral Commission has also taken special note of the need for vigilance on issues such as “family voting”, which particularly affects women voters and the secrecy of their vote. Further action on the matter taken by electoral authorities include redesign of ballot booths to prevent more than one person using the booth, production of Electoral Commission posters warning of family voting being a criminal offense, increased staffing at booths to monitor and identify instances of family voting and guidance to the police on the law for them to act. These actions relate directly from observer reports on family voting. However, consistent training on this is not as widespread as hoped. Observer groups would like to see this training as a standard part of presiding officer training to curb and prevent the practice. Furthermore, observer groups are at times also prevented from performing their duties by poll workers, in part due to ignorance or insufficient training. This is also seen as an area of needed improvement and consistency required across training programs.

North Macedonia, having done a post-election training evaluation, found that more time was needed for training on administration of required forms and operation of equipment for biometric identification of voters. Canada has identified opening and closing procedures as some of the most complex situations during the elections. Newly-trained and more experienced poll workers are trained differently in such areas of complex polling operations. Future Canadian approaches will see a greater emphasis on documentation and record-keeping as well as special provisions which represent exceptions to the routine voting process. Additional emphasis will be placed on challenges such as marking voters having voted in multiple points.

Mexico hosts a special session on handling and overcoming objections in addition to general training. In this training, five lessons are heavily supported by training videos. Each lesson had an accompanying exercise to assess knowledge, followed by an end-of-course evaluation. Mexico currently trains its professional staff on ethics, nonpartisanship, leadership, and use of social media. Australia increased its use of training videos on sensitive topics, building on the use of QR codes into training manuals to allow poll workers to easily access videos by scanning the code with their smartphones. Australia also uses a simulation game to complement online training modules and readiness simulations to promote compliance and quality assurance within the AEC’s operational environment. Future topics will focus on the contextual elements of elections. This includes

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12 Family voting is where family members enter a polling booth together with the specific intention to collude or direct voting intentions, compromising the ability of, mainly, women voters to cast a secret ballot. Countries such as the UK, and to a lesser degree Sweden, the Netherlands, suffer from this. This is sometimes done under the guise of assisting disabled voters or illiterate voters.
disinformation, security, health, neutrality, cultural appreciation and strengthening the service ethos part of training materials, over and above polling station management for voting and counting. Other studies also reference the importance of taking home reference material for self-study leading to improvements in the performance on certain areas of vulnerability.14

A further concern from Mexico involves the future of proposed combined federal and local elections. This will increase the number of ballot papers, making the process of receiving, counting, processing and managing more complex in the future, increasing the training challenge.

Training Delivery Methods

Getting everyone trained

Reaching masses of poll workers relies on strong and coherent training. Approaches such as cascade training methodology are most widely used in many countries for poll worker training programs. This approach involves training a small group of individuals who then go on to train others, creating a cascading effect. Cascade training has the benefit of:

- **Scalability**, where a small pool of trainers can train large numbers of poll workers;
- **Local ownership**, where local trainers can take partial ownership of the training process;
- **Sustainability**, through building local capacity to train others in future; and,
- **Timeliness**, allowing thousands of poll workers to be trained in a short enough time to run an election.

Cascade levels could involve the following three levels: National level trainers, state or district level trainers and supervisor poll workers (presiding officers and deputies). In some instances, the district level trainers train all poll workers including the supervising officers and, in other instances, the supervisor poll workers are expected to train poll workers in their polling station. The cascade training method does have its drawbacks, including:

- **Weak quality control**: The possibility of degrading content quality as it passes from level to level is high;
- **Limited interaction**: Where the bottom-most part of the training cascade closest to the polling station do not have access to the most knowledgeable trainers who can address complex questions; and,
- **Limited local customization**:15 Due to reliance on standardized materials, the ability to adjust to local trainees or communities or circumstances is limited.

Addressing Cascade Challenges

To address cascade training challenges, countries have tried different strategies.

- **Brazil** Context: Diverse geography, 156 million voters, two million poll workers, 27 states, electronic voting, single day elections
  - Quality Control: Mock elections, standardized training materials from headquarters, interactive training exercises, evaluations and monitoring;

14 Burdon, B.C. and Milyo, J. 2013. The recruitment and training of poll workers: What we know from scholarly research. Report prepared for the Presidential Commission on Election Administration
15 Some may not see this as a drawback, insisting that a uniformity that complies with the law overrides improvisation and amendment. Customization here, however, is seen as maintaining legal parameters and ensuring its best possible application across a wide diversity of local contexts.
- Limited Interaction: Greater use of interactive digital training materials such as a mobile phone application; and,
- Limited Customization: Different training modules for urban and rural areas, culturally relevant materials customized at the state level at the point of delivery.

- **India** Context: Most populous country in the world (as of April 2023), 911 million voters, 11 million poll workers, 28 states, electronic voting, multi-day elections
  - Quality Control: Standardized materials, monitoring and evaluation of trainers;
  - Limited Interaction: Face-to-face interactions, online training modules, video conferences; and,
  - Limited Customization: Decentralized training model for design and delivery at state level.

- **Canada** Context: diverse population, some areas low population, 27 million voters, 177,000 poll workers, 13 administrative divisions, paper ballot, single day elections
  - Quality Control: Regular monitoring of trainers, evaluations of training programs;
  - Limited Interaction: Video simulations, online modules, a training app, online portal; and,
  - Moderate Customization: Different training modules for urban, suburban and rural areas, involvement of indigenous communities.

- **United Kingdom** Context: 317 local government-run elections and training, 48 million voters, 35,500 polling stations, single voting day
  - Quality Control: Standardized materials with trainer guidance by the Electoral Commission, clear performance standards, monitoring, and evaluation by multiple entities;
  - Limited Interaction: Master training by professional association on interactive methods, video simulations, online training modules; and,
  - Limited Customization: Some tailoring of materials based on agreed national performance standards and guidance by local authorities, and professional electoral association.

- **Ethiopia** Context: Post-conflict elections in 2021, newly reconstituted EMB needed to start fresh in 2021 with new processes, elections initially postponed due to COVID-19 pandemic, 40 million voters, 230,000 poll workers, 10 regional states, ongoing secessionist and ethnic conflict and not all areas held elections, single voting day
  - Quality Control: Limited quality control due to nascent EMB structure and instability, call center support for trainers;
  - Limited Interaction: Participatory training methodology via training of trainers; and,
  - Limited Customization: Not explored except for language variations.

- **South Africa** introduced a peer-to-peer program where experienced poll workers train and mentor new poll workers within their cascade approach. Similarly, **Australia** experienced state level electoral officials support trainers in the first few trainings to ensure good quality delivery.

To supplement cascade training, mobile teams of trainers have also been used to access remote areas that are hard to reach, including countries like Cambodia, Afghanistan, Pakistan, Liberia and Sierra Leone. These mobile teams are equipped with materials and equipment necessary to conduct training in the field. Mobile teams of trainers can be an effective way to reach areas where it is difficult to organize traditional cascade training, including remote, weather- or conflict-affected areas. However, it can also be more costly.
Persistent challenges

Canada has found that levels of “dropouts” – that is, those who do not show up to work their shift among poll workers – fluctuates and warrants special provisions. For example, in the 2019 elections, the numbers of dropouts rose four-fold from the 2015 elections and were concentrated in 97 electoral districts. This abnormal concentration meant there was no time to train new staff and the decision was taken to merge polling stations, compelling existing staff to administer the polls for two polling divisions instead of the usual one.

The problem of dropouts appears universal, with countries like Romania and Poland also reporting challenges. Romania cited an example where they started with 80,000 poll workers at the point of training, and, due to the large number of dropouts, only had 60,000 to draw from for the 38,000 senior positions in the polling stations. During the pandemic, 150 polling stations out of 1,260 had one member remain because either the deputy or presiding officer went missing with only 14 poll workers to replace them. This results in a situation where those who are available, regardless of quality, must assume these leadership positions at a polling station. Poland reported resignations after training as a common occurrence; but, while they compiled a reserve list from surplus applications, the country has not yet trained them ahead of election day.

This dropout-factor warrants monitoring on election day and rapid intervention. While surplus staff can be trained to replace dropouts, such as in Australia and Georgia, this carries a cost implication regardless of whether reserve staff are used or not. Mexico trains an additional three alternatives who can serve as reserves in each polling station. Strategic intelligence from past elections or an analysis of local circumstances in the run-up to elections can assist, but this challenge will continue to plague EMBs. Other solutions considered is offering remote training via phone (call center support and/or online videos), ensuring rapid learning materials (such as flash cards) exist at the polling station or requiring poll workers to learn on the job through repetition.

Alternatives to Cascade Training

Cascade training is not the only approach to poll worker training. Other means of training methodologies involve small clusters of trainers who travel the country and deliver training to poll workers in different venues. In countries that are small enough or have sufficient infrastructure and time to allow for this approach, such a method is seen as circumventing the common criticism of cascade training— that of reduced quality due to too many layers in the cascade. Skilled and knowledgeable trainers can address complex questions and scenarios throughout the training process, whereas in a cascade model these trainers are usually only at the very top of the cascade.

Moldova, Armenia and North Macedonia have used mobile teams to replace the cascade method. Mobile teams traveled across the country and delivered the same training to poll workers to reduce the levels involved in the cascade method. This has the benefit of keeping quality content at a more consistent level, a major weakness when using many levels of trainers.

In both delivery methods, EMBs and their training entities rely on the support of local public authorities and permanent staff of electoral authorities in the regions. District electoral authorities have permanent status in Georgia, Moldova and North Macedonia and have the mandate for electoral training. They are involved in training preparation and logistics or conduct the training themselves (after attending a ToT and being accepted to a pool of trainers). Local public authorities usually offer training halls and other logistical support. In Poland, local authorities use their websites to display election information including PowerPoint presentations with useful information for local election commissioners.

A move away from lectures and large class numbers

In all cases reviewed, the central body at the EMB’s headquarters drives the training strategy, methodological
EMB training approaches have been responding to changes as evidenced by countries such as Brazil, Romania and North Macedonia. The training evolution of the Superior Electoral Tribunal (TSE) of Brazil illustrates this in more detail. The TSE started its training cascade model in 1996 with the introduction of electronic voting, relying on three tiers of their training cascade approach, beginning with a small group (in the electoral supreme court), then another larger group (27 regional courts) and 3,500 training “multipliers” (municipal and county courts), following the TSE structure.

The TSE observed they had gaps in the lecture-based cascade model. They sought to make instructions more uniform by using standardized manuals via an online mobile application and used YouTube for videos. In interviews, they noted improvements over the last three to four elections. The online materials allow for centralized control of content and can be easily updated and uploaded, with push notifications alerting users of the updates. The mobile app complements delivery of in-person format training for the two million poll workers. Face-to-face training occurs in a variety of contexts, including remote forests away from the capital and in some areas with no electricity or internet where printed manuals are still used.

Countries such as Romania also changed their initial training approach. Lecture-style approaches in large amphitheater rooms with a hundred participants gave way in 2020 to smaller clusters of 20 participants and professional trainers introduced. Interactivity was initially restricted to questions and answers and the change to smaller groups allowed for greater variety in the interactive approach and methodology. In almost all EMBs surveyed, class size was restricted to between 20 to 30 participants.

North Macedonia, ahead of its 2019 presidential elections, dramatically adjusted its training approach:
- Election trainers underwent a more in-depth selection process;
- Trainers underwent a certification process containing adult learning principles and methodologies;
- Classroom sizes were reduced from 100 to a maximum of 30 trainees;
- Switched to interactive training methodologies, instead of lectures;
- Increased the training time to five hours\(^\text{16}\) instead of the previous 90-minute sessions; and,
- Used tailor-made training materials, instead of only slide decks and videos.

The success of this approach saw the 2019 model re-used for the 2020 and 2021 elections with adjustments based on lessons learned. This model was regarded by an external evaluator as more effective and improved training quality. The approach was highly praised by trainees and allowed for continuity via election trainers.

Lecture style approaches are giving way to more hands-on approaches such as interactive activities and simulations. From the brief survey of EMBs, it is clear that a variety of approaches are used in the delivery of training. Unlike past experiences where the lecture-style dominated, there is an increase in the use of a variety of complementary adult learning methods in training delivery. Using simulations in the delivery of training is a dominant feature.

Global programs, such as BRIDGE\(^\text{17}\) – Building Resources in Democracy, Governance and Elections – that emphasize participatory training methodologies influenced this shift away from a lecture-dominant style of learning methodology.

\(^{16}\) In a survey response, North Macedonia reported that poll worker training can last two days.

\(^{17}\) BRIDGE as a professional development tool using an activity-based participatory adult learning approach that maximizes retention of knowledge and skills learned. Designed to promote or reinforce professional confidence, ethics, understanding of principles of best electoral practice and access to networks of peers, BRIDGE trainings have been offered to more than 17,500 participants in more than 120 countries. See http://www.bridge-project.org.
Hybrid training modalities

Trainers have several delivery modalities they can use beyond the classroom. **Canada**, for the 2019 elections, added new training methods to their repertoire of approaches. This included a three-hour long webinar for all poll workers, an online course for deputy Returning Officers and a self-training workbook for a selected number of roles. Introduction of flowcharts accompanied the user-friendly design and use of plain language, as well as prescriptive steps for regular or special voting scenarios. The post-election statutory audit recommended the prioritization of scenario-based training for special procedures, due to limited training contact time. This would need to be based on the volume of needed special provisions. This combination of self-study, face-to-face training, online webinar approaches and increased scenario-based approaches is seen as helping future training delivery and part of the general evolution of election training approaches in Canada.

**Mexico** has also opted for a hybrid approach for poll worker training, retaining face-to-face training as their primary modality, in addition to the virtual training courses. Online materials were always available continuously on the **Evanza** platform, including on weekends and holidays. The online training modules were compulsory training for their trainers, but optional for poll workers. The general electoral training program consists of six modules with 19 lessons. Seven training videos are used, as well as six exercises along with final evaluation. In parallel to face-to-face training, **Mexico** used virtual training to expand and strengthen classroom training. Mobile applications could be used with or without a network, allowing participation in virtual training courses. However, it could be limited by factors such as internet access or the technological or educational skills of participants.

**Australia** consciously conducts training in two stages, using a hybrid approach of virtual and classroom training. The first stage is an online course that covers the basics of election procedures and the roles and responsibilities of poll workers. The second stage is an in-person training session that provides more detailed information using simulations. Not all poll workers attend the in-person sessions. For example, only senior officials (officer in charge and the deputy officer in charge) attend the in-person sessions. During the pandemic, in-person sessions were replaced by virtual sessions where needed.

Increasing interactivity

Many of the ways to address stress points and other training content can be enhanced through greater attention to specific areas and increasing interactivity during training. Some suggested methods are:

- **Simulation Exercises** One approach is to conduct simulation exercises where poll workers are given the opportunity to practice sensitive or vulnerable parts of the election process in a controlled environment through mock elections. This can help identify areas where additional training is needed and build confidence and proficiency among poll workers.

- **Role playing** Use role playing to help poll workers understand roles and responsibilities involved in the election process. This can help to clarify expectations and build empathy and understanding among poll workers.

- **Case studies** Case studies or real-life examples to illustrate challenges and vulnerabilities that arise during the election process. This can help poll workers to identify potential issues and develop strategies to address them.

- **Interactive training** Interactive training methods, such as group discussions and problem-solving exercises, can be used to encourage participation and engagement among poll workers. This identifies gaps in knowledge and understanding that need to be addressed.

- **Specialized training** Poll workers who are responsible for sensitive or vulnerable parts of the election process, such as ballot box security or vote counting, may receive specialized training to ensure that they are prepared to handle these responsibilities. This includes additional training on security measures, handling and transporting ballots and verifying and counting votes.
These methods lengthen training sessions; but, general consensus indicates that the time investment is worthwhile given the potential political and reputational cost of poor performance at the polling station.

**Separating audiences during training**

Increasingly, in many countries, pressures are mounting to train audiences beyond poll workers. This is particularly true in countries where poll workers are recruited through nonpartisan channels, including Canada, Australia, the UK, Brazil and Ethiopia. In countries where poll workers are drawn from political parties, this is less of a consideration. Romania, for example, indicates that for their out-of-country voting, anybody must be able to assume any role. This includes political party representatives, who are usually separate from the polling station leadership. Anyone should be able to step into any role and fulfill it, for example, as operators of the tablet equipment. Norway has had the challenge of combining experienced and inexperienced poll workers in the same training; an online portal has helped them address this, with the portal easing the pressure to attend voluntary in-person trainings. In Ecuador, a department from the EMB takes responsibility for training party representatives. Training security officers that work during elections is also an audience that requires dedicated training as in Kenya and Nigeria.

**Technology integration**

Ahead of the COVID-19 pandemic, many EMBs we engaged were either intending to or had already confirmed plans for online delivery of their training. The pandemic compelled EMBs to either fast-track or shift to online means of training delivery. Canada presented Returning Officers with four options for delivering training to the 177,000 poll workers:

- Classroom training sessions: In-person and trainer-led; physical distancing, required masks and sanitization measures;
- Remote training sessions: Virtual and trainer-led;
- Training workbook: Self-paced review of training materials;
- Online training module: Virtual and self-paced.

Returning Officers were trained via the Virtual Training Center, or through self-paced manuals review. Canada cited challenges in keeping up with materials revision due to constant changes in pandemic provisions. Brazil, via its online mobile application, has managed better. Brazil, in addition to the use of YouTube to distribute training videos, used Moodle, an open-source learning management system, or LMS, and a downloadable mobile app, called Mesário. The latter allowed for significant data analytics. Use of its distance learning portal allows for a catalogue of courses to be placed online, general training about the TSE, poll workers’ duties and responsibilities (including those working nationally, managing out of country voting, working as diplomatic representatives and counting votes), internal corporate courses for the TSE (such as audit, communication, laws, leadership development, staff management, corporate education, information and cyber security and internal systems), electoral court communities and dedicated space for regional electoral courts to host targeted trainings dealing with technical, behavioral and managerial skills. Development of the mobile app was managed in-house because the TSE has significant information technology experience. This reduced development costs significantly and the TSE took a phased approach to its upgrade, starting first with a PDF-version of the training manual, before later adding more interactivity.

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19 The Mesário app is available in the Google and Apple app stores and is one of multiple downloadable apps that Brazil developed and made available to the public.
Moldova and Philippines actively use a LMS as part of their training. Moldova has 22 courses online in an online library. Mexico moved from a locally produced LMS to a commercial LMS (called Blackboard/Anthology) in 2017, in-part migrating their training of professional staff online in 2018 and then went fully online ahead of the pandemic. The switch to a commercial LMS offered more built-in capabilities, sophistication, expansion potential and efficient support. LMS allows Mexico to offer a structured training program for their professional staff, regardless of where they are posted. The pandemic required them to integrate the LMS with an online system for administering examinations of permanent staff.

After three years of use, Mexico is concerned about LMS license renewal in the face of pending budget cuts. Given 100 percent reliance on LMS for training its permanent staff, this represents a significant vulnerability for them. In the Philippines, the LMS contains training materials, along with simulations, quizzes and operational instructions for vote counting machines. All of this is available for access prior to the actual training, allowing for preparation and practice. Mexico incorporated ongoing training of poll workers, such as refresher courses, on-the-job training and mentoring programs to ensure continuous learning rather than having a single training event.

**Table 3 Online Survey Results**

48. What training modality are you using? Select all that apply.

<table>
<thead>
<tr>
<th>Training Modality</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Face-to-face (in person)</td>
<td>37%</td>
</tr>
<tr>
<td>Online (remote)</td>
<td>37%</td>
</tr>
<tr>
<td>Blended (hybrid)</td>
<td>26%</td>
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</table>

Norway, in 2021, after its parliamentary elections, introduced an online portal for voluntary use by poll workers. The initial user number was 71,706, when the portal was new. However, now that it is more established, 93,090 unique users had already accessed the portal by June 2023 and these numbers are expected to increase significantly. With voluntary training as the norm for Norwegian poll workers, municipalities who run the actual elections are being supported via this portal with standardized training, guidance and tools offered by the Norwegian Directorate of Elections. Certificates for completing online training courses is part of the portal design.

Australia increased the use of online video-conferencing platforms, namely through Microsoft Teams. The training center pioneered and drove the use of Teams within the EMB. One of the major lessons learned from this experience was the ease of transforming online learning to in-person sessions and the more difficult challenge of doing it the other way around. Using online tools also meant that trainings could be available at any time; not just when face-to-face sessions were rolled out. This was seen as a powerful benefit. It is foreseen that electoral training, following learning trends elsewhere, will become more and more self-reliant and on-demand, complement scheduled instructor-led group learning.

In addition to using technology to distribute learning materials, Mexico uses five mobile phone apps to manage and monitor the delivery of training for poll workers. Trainers, who are provided with pre-configured mobile phones, update a checklist of completed tasks, confirm people trained and enter participants’ demographics. Manual forms are available for entry in areas with limited cellphone coverage which is uploaded when trainers are connected to the phone network. One of the apps also allows for monitoring election day performance of polling stations. Electoral supervisors, who oversee trainers, use mobile apps in a similar way and provide trainer performance feedback. Due to the real-time nature of updates, district level staff intervene when they notice lower than expected training participation.

Online adaptations were not easy for everyone

Georgia and Mexico insisted during the pandemic to continue with face-to-face delivery of poll worker training. Practical in-person demonstration was deemed to be paramount and could not be replicated online. This is despite Georgia’s experience in online learning via their LMS. The country invested heavily in strengthening training materials to ensure completeness, providing explicit instructions and practical examples. Distance learning via online technology was seen as a complement to the primary delivery method and useful for refreshing knowledge. Bangladesh, in a 2021 webinar, stated it struggled to use online learning effectively because it remained a foreign concept to participants. The pressure to deliver training to half a million poll workers in Bangladesh in a short window of 15 days meant face-to-face learning remained the favored approach under pressure.

Potential Future Trends

EMBs will be increasingly confronted with technological innovations such as artificial intelligence (AI) to improve training. Besides data analysis, AI holds potential in learning and development areas such as automated content generation (training materials, quizzes, and interactive training modules), virtual simulations, intelligent tutoring (providing targeted guidance and support), chatbots and virtual assistants (available real-time and continuously) AI can strike the balance between human interaction and technological use. This could allow small training units at headquarters to have more impactful reach and monitoring of training rollout and performance in the future. It will require combining new skill sets, linking them with solid adult learning principles and clear vision and leadership support for training improvements to adopt new technologies. Clear needs analysis, exploring potential uses, pilot testing, gradual phased implementation and change management approaches could prove useful to explore. Brazil indicated its intention to recruit AI specialists in the future to adapt to emerging technology.

Training Evaluation and Assessment

Training evaluation and assessment was acknowledged by many as a continuing challenge. A wide variety of approaches are explored by EMBs, some of them directly related to training, some indirect. Some are focused specifically on poll workers, while others assess the trainer as well. The approaches encountered are described below in pre-election day and post-election terms.

Pre-Election Day Methods

In-Training Assessments Classroom tests and evaluation forms can be useful tools for assessing poll worker training effectiveness and identifying areas for improvement. Many countries conduct in-course written testing of poll workers, with an expected passing score of 70 percent or higher, to demonstrate their knowledge and understanding before they can work on election day. This includes some states in the United States, Australia, Germany, and Japan. The tests typically cover voting procedures, handling of ballot papers and managing polling stations. In some instances, such as training in North Carolina in the United States, testing is administered via an “open book” method, as trainees are encouraged to navigate the training manual to find information and increase their understanding of the document. In the Georgian context, with certification via a written examination at 22 centers, scoring allows close tracking of legislated percentages and allows for monitoring competence at the point of training and competence. Serbia also legislates the required competence rating that must be achieved in testing during training.

Trainer performance is also assessed by some EMBs. In Georgia, if a trainer is not considered to be performing to the required standard, they are not re-engaged for future training. Spot-monitoring and anonymous satisfaction surveys point to the quality of training received.

21 The webinar titled “Electoral Training: Content Development, Andragogy and Training Methods” was organized by the Election Commission of India (ECI), the India International Institute of Democracy and Election Management (IIIDEM), in association with IFES and International IDEA, and conducted on November 16-17 r 2021.
Table 4. Online Survey Results

33. Are you evaluating the participant’s knowledge and skills?

<table>
<thead>
<tr>
<th></th>
<th>29%</th>
</tr>
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<tbody>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>71%</td>
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Combining Assessments Mexico, for its poll worker training, requires participants to complete three exercises that reinforce knowledge and allow each person to identify their new learning. First, trainees are required to complete six practical exercises across different modules. Second, trainee satisfaction was also assessed in terms of expectations, training materials, use of remote methods of training delivery such as Webex or Microsoft Teams online platforms and facilitator competence. Third, a final evaluation is administered. Stemming from the final evaluation, the rate of correct responses allows the INE to target specific areas for further training. Online platform use makes this element a feasible aspect of adjusting the training. The near-instant feedback coming from the online system with regard to evaluation exercises was highly rated by trainees because they were immediately told about errors or wrong answers. During virtual training implementation, a call center supported users on using a virtual platform. It is also common practice to use evaluation forms after the training sessions to assess the quality of the training. This practice is common in the UK with feedback sheets.

Conditional Assessments Some EMBs use conditional assessments, meaning that poll workers must complete a certain part of the training with an assessment before they are allowed to continue with the next step of the training program. COMELEC in the Philippines requires poll workers to complete a face-to-face training on LMS use for e-Learning before they continue onto the online examination, upon training completion. The online examination is then linked to certification that stems from the Department of Science and Technology. Australia uses an LMS and Brazil utilizes a mobile app that tracks participants learning online and limits their progress to the next step of training without reaching a level of competence.

Pre-Election Readiness Programs Australia assesses its permanent workforce through a series of simulations as part of their Election Readiness Program. Key procedures and practices are replicated and staff assuming actual election roles for the simulation. Training preparation and implementation is practiced and areas requiring correction are assessed and corrected ahead of the elections. These readiness assessments ensure another layer of quality control beyond training, ahead of elections. Currently, these simulations are restricted to the permanent workforce, ensuring that one layer of the workforce has been assessed in terms of executing tasks ahead of an election. Use of readiness programs depends on tight planning and training rollout, along with dedicated staff overseeing implementation, allowing enough time to correct errors picked up during the mock exercises.

Post-Election Day Methods

Using post-election targeted training evaluations Some countries use the post-election process to evaluate the impact of training and identify shortcomings and gaps. These involve discussions with other stakeholders such as political parties, election observers and civil society representatives. North Macedonia used an extensive post-election review process that targeted training from 2019 to 2021,23 digging into documentation, conducting an online survey, administering key informant interviews and focus group discussions to develop a clear set of findings that informed recommendations for improvement. Serbia, following its 2021 elections, also conducted a survey of trainers originating from local authorities to gain lessons to inform changes to their training practices.

Elections Canada conducts a thorough lessons-learned exercise after each election, including a statutory

audit. In 2015, Price Waterhouse Coopers conducted a statutory audit and report on the performance of electoral officers. The report identified several shortcomings in training tools and practices. This resulted in a revised training strategy combining classroom and hands-on training to improve learning. A similar 2022 report recommended training enhancements and tools that would see increased scenario-based training and increased focus on specific documentation and record-keeping. Elections Canada also conducts a post-election survey of electoral officials to assess satisfaction with training. Returning Officers in Canada also review the performance of trainers in their jurisdiction. These combined mechanisms result in significant updates in certificates, forms, training guidebooks and general approaches.

**Overall Performance Evaluation** The UK Electoral Commission, mimicking local government in other areas, sets performance benchmarks for voter registration and electoral registration officers and elections and returning officers. This is focused on overall performance and not just that of poll workers. Performance standards are framed as outcomes or impacts and local authorities are then able to develop processes that meet those outcomes. Guidance for good practices to meet the outcomes is shared via the website. Compliance with these benchmarks is voluntary and reputational risk of noncompliance is an incentive for adoption by local governments. Performance against the benchmarks is published online so that each local authority can measure how they have met standards. While initially slow, adherence to standards increased in the second elections as results started were published. Positive effects of the benchmarking were seen as:

- Improved confidence in election administration within the council, candidates and the public;
- Frequent evaluations of electoral services;
- Consistent services were produced;
- Increased contingency plans and risk management;
- Closer and more formal links with other stakeholders in the elections process; and,
- Increased individual and team morale among well performing councils.

While there has been a concern about being “named and shamed” and lack of resources to meet all benchmarks, the positive impact of the benchmarks outweighed the concerns. The risk of attack by opportunistic politicians does exist; but, efforts to improve systems, processes and training are seen to outweigh these risks. Publicity around the scheme and the use of a central website for publishing performance was central to benchmarks success. It has helped identify excellence in practices, with experience and ideas shared throughout decentralized electoral administration.

**Australia** also incorporates performance measures regarding learning and development into its annual institutional review. This allows the training center to report on compliance with internal performance measures and overall regulatory performance put in place by the Australian Government. The AEC seeks to reduce the burden on voters through more efficient voter registration and voting services, relying on ongoing improvement, building trust and risk-based and data-driven efforts and collaboration and engagement.

**Norway**, where municipalities implement training and deliver elections, no standard exists for assessment. Each municipality conducts its own training and sets its own competence standards. Use of a central online portal by the Norwegian Directorate of Elections supervises issuance of completion certificates for

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24 Section 164.1 of the Elections Canada Act requires the Chief Electoral Officer to engage a knowledgeable auditor to assess the proper performance of electoral official duties as per the Act.


online training courses. However, the Ministry of Local Government and Regional Development conducts independent post-election evaluations of both the conduct of the election and the Directorate’s services. Evaluations provide the Directorate with valuable insight when it comes to performance of election officials and poll workers and success of the training program and services.

*Indirect mean* The United Kingdom conducts a regular voter attitude and behavior survey in which elements such as modernization of polling practices is explored. This could include expediting voting, convenience and physical accessibility. These information-rich surveys point to voter experiences and potential performance improvements that may be needed as well as tension where efficiency needed to be balanced with other factors. For example, making voting easier was seen as losing the social and emotional value of the vote. These views are based on the experience of voting and represents an indirect check on the performance of poll workers.

In the UK, one area that could point to whether training impacts performance relates to electoral fraud allegations. Only one percent of 595 cases of alleged electoral fraud raised with the police related to administration of the 2019 elections. Of these four reported cases, representing breach of official duties, three were found not to be offenses with no further action required and one was locally resolved. Overall, in the 2010-2019 period, breaches of official duty allegations fall in the zero to three percent range with 2018 having zero allegations and 2014 reporting three percent irregularities of all cases. This points to consistently high performance among electoral officials in UK elections.

**Australia** relies on the annual Australian Public Service survey. The AEC introduced a general standard and agency-specific questions that allows them to gain insight into their performance and the role of training.

**Specific targeted analysis**

Post-election reviews of specific errors can point to performance issues that may be resolved by training and other improvements. Research conducted in Ohio in the United States, showed that election officials in a county picked up a high rate of errors relating to provisional ballots. These are ballots where the voter placement in a polling district was uncertain; but voters were issued a ballot at the point of voting and their actual placement and count was confirmed later. In assessing the reasons for this high error rate, they realized that a) they needed to improve their training techniques on the topic, b) they needed to strengthen the end-of-class tests to target this topic and c) identified clusters of “at risk” polling stations. This evaluation allowed them to target specific polling stations through staff replacement. Analyzing negative trends in polling practices and vulnerabilities that may emerge allowed them to take constructive steps to address the issues with training as part of the solution.

**Combining Pre-Election and Post-Election Methods**

In the case of Brazil, where a mobile phone app is used to support training, the electoral tribunal combines real-time analytics to monitor usage of the app as well as challenges with the poll worker quizzes. Corrections or updates can then be made quickly with new information being pushed out via the app. In the aftermath of an election, due to the use of electronic voting machines, data from polling station error-logging can be combined with mobile app data to identify areas that require performance improvement. This combination of digital datasets is a unique feature that allows the Brazilian EMB to be more granular and targeted in its monitoring of the performance of poll workers and the impact of training. Blending this analysis with other
post-election review data, clear good practice lessons have been learned from specific jurisdictions where major improvements have been noted. Lessons from specific geographical and topical areas are then shared across all states with a view of continuous electoral training. This approach targets areas of weakness and pockets of excellence which can inspire and motivate others to improve.

**Mexico**, when training poll workers, evaluates the performance of their trainers in a structured manner, relying on a combined pre- and post-electoral approach. In pre-elections, 40 percent of the trainer’s performance is assessed based on the data, from a two-step process, entered into a mobile phone app. This includes the number of people visited and recruited to work in polling stations in the first step and the number of people trained in the second step. Twenty percent of trainer performance evaluation is done subjectively by the district office in whose jurisdiction the trainer worked on their performance in both steps. As each trainer must service four polling stations, and use a mobile app to record data, this process is manageable. In the post-election period, every results certificate and returned electoral materials, are evaluated, assessed for consistency, accuracy, errors and completeness. This makes up the remaining 40 percent of the evaluation of each trainer’s performance. A national sample of electoral packages from polling stations is studied in detail to serve as a lessons-learned approach and improve on electoral training and operational elements.

**Outside of the Electoral Period**

**Mexico**, for the training of its professional electoral staff, uses an LMS to administer mandatory training courses. Their evaluations are multi-level, requiring an essay, reflection and a graded examination. Whereas, a grading process using supervisors to oversee in-person exams was used in the past, this changed due to the COVID-19 pandemic. **Mexico** purchased proctoring software which monitors timed exams on computers, webcam video and audio. This system works with the LMS administering the exam process. The training courses for professional staff stand separate from elections and are suspended temporarily during election time. The annual performance evaluation is linked to elections. For each election, special goals and competencies are set for the permanent workforce and approved at the highest decision-making level and then each staff member and training officer is evaluated. This differs from the typical performance evaluation in non-election years. For the first time, according to its 2023 workplan, **Mexico** will conduct a triennial performance evaluation, linked to a three-year training program.
Electoral Training
Organizational Aspects and Logistics

Organizational aspects and logistics play a crucial role in successful implementation of electoral training programs. Here are considerations in terms of organizational aspects and logistics for electoral training.

**Figure 2. Training Administration Components**

- **Training Schedule.** The training schedule, including dates and times, is usually reflected in the training plan developed by the training organization when the election date is announced by the electoral authority. The training period is also indicated in the election implementation plan of the election regulatory authority. In some larger countries, the training schedule must be correlated with a logistics plan which includes delivery of training materials and necessary equipment for training. This demands greater internal coordination between the training and operations and logistics function. The ability to coordinate is an understated skillset needed from a training manager. The availability and convenience of participants are also taken into consideration when scheduling training.

- **Training Venues.** Identifying suitable venues to conduct training sessions is an important logistical task. This can include electoral offices, community halls, libraries, conference centers, or other suitable locations, such as hotels (costly) or schools (cheaper). Hotels can be useful for the training of trainers but not for training rollout because costs are high. Accessibility, capacity, and availability of necessary facilities, including audiovisual equipment and internet connectivity, are taken into consideration in the researched countries. In most cases, training entities coordinate the availability and parameters of the training venue with local authorities. The training centers from Moldova and Georgia also have dedicated training halls that are used for training workshops in the capital cities.
**Participant Invitation and Registration.** There are several practices for enrolling election officials in training. The first, used in **Poland**, **Bulgaria**, **Moldova**, **Georgia** and **North Macedonia** is based on the invitation to training through the upper-level electoral bodies. The head of the district-level election authority invites poll workers to training organized by the training entity. They communicate relevant details to participants prior to training, including the training schedule, venue location and any required preparations. Reminders, updates, and any additional instructions are needed to ensure participants are well-informed and prepared. The number of participants and their positions usually depend on requests originating from the training entity. In **Poland**, each district and regional level electoral authority has a high level of independence in choosing participants to be invited to the training. Another way of enrollment is through an open registration process. This is practiced in **Romania** and **Australia** when they are recruiting polling station staff and in **Moldova**, between elections, political parties may register their representatives to the workshops provided by the training center. Alternatively, in **Moldova**, participants of the district election officials training program are invited to the training workshops directly from the head office by the training center coordinator. In **Ethiopia** district election officials were invited to the training workshops by an election authority call center. For the same purposes training entities use SMS messages or are messaging participants through different social media – *Facebook Messenger*, *Viber*, *WhatsApp* or *Telegram* – which are used for coordination of trainers or teaching purposes. **Mexico** uses its dedicated mobile apps with task lists and checklists to assist trainers and supervisors and push communications.

**Training Materials and Equipment.** Training materials and equipment, including those distributed to participants during training must be delivered to places where training workshops are conducted in a timely manner. In **Moldova**, mobile teams of trainers bring all materials and equipment with them when they are traveling to the training location. Other electoral entities rely on regional and district representations of the electoral authority or local public administration.

**Trainers and Coordinators.** Coordination between trainers is one of the key logistical tasks for training centers and departments (**Moldova**, **Georgia**, **North Macedonia**). It starts with identifying qualified trainers, ensuring that trainers are well-versed in specific training content and are capable of effectively delivering material to participants. Next, is creation of effective teams of trainers, confirmation of areas and districts to be covered by the training team, ensuring good communication with district electoral authorities and then packing and sending the team. Sometimes coordinators resolve unforeseen issues which may appear on the way or during the delivery of the training. At the last stage, the coordinator receives evaluation forms, remaining training materials and equipment and training reports from the training team. **Mexico**, through its system of electoral supervisors, places a heavy focus on oversight, providing supervisors with a mobile app to record real-time data on trainer management and progress. All trainers and supervisors continue to support polling stations under their control during election day and thereafter until the elections are completed.

**Travel and Accommodation.** If training involves participants from different locations, or it is multi-day, there may be a need for travel and accommodation arrangements for participants and trainers. Arrange transportation and lodging for participants who require assistance or are attending from remote areas. If accommodation and transport are not provided, training entities should ensure a stipend which would covers these expenses. In **Canada**, poll workers, enrolled in the training program are paid for their participation in training.

**Funding Training Activities**

Financing training activities in electoral processes is crucial to ensure effectiveness and sustainability of capacity-building initiatives. Here are the modalities of financing of the training activities in the research countries:
- **Government Budget.** The government allocates a portion of its budget specifically for electoral administration, which includes in Moldova, Georgia and Australia, funding for training programs between elections. There is a separate budget for training polling station staff and training election officials and stakeholders for a specific election. This funding originates from the central government and distributed to local authorities responsible for organizing elections. The training centers from Georgia and Moldova have separate budgets. It is coordinated with the CEC and comprises a part of the CEC’s annual general or election budget.

- **Private Funding and Fees.** In certain cases, training programs may have a fee associated with participation or be requested by different stakeholders. These are usually cases of training conducted at the request of political parties, civil society or international organizations and not included in the state budget of the training entity. Such training programs are conducted from time to time by the Moldovan training center, offering political parties that receive public funding and other political parties that do not the possibility to build capacity of their staff and supporters who could be trainers, register candidates and serve as poll watchers at different levels of election administration.

- **Donor Organizations/International Assistance.** In Moldova, Georgia and North Macedonia, training programs for election officials may receive funding from donor organizations or international assistance programs. Development agencies, or international election support organizations, provide financial support to strengthen electoral processes, including training initiatives such as LMS. Usually, there are additional training programs, not included in the general or election budget of the training entity. In Moldova, training potential and future election officials was not covered by a government budget.

- **In-kind Contributions.** Apart from direct funding, training programs may receive in-kind contributions. These include the provision of training venues, training materials, equipment, or the expertise of trainers who volunteer their services. In-kind contributions usually come from local public authorities, partner organizations and volunteers.

Effective financing of training activities is essential to sustain capacity-building efforts in electoral processes. By combining government allocations, international assistance and support, private partnerships, in-kind contributions, training initiatives can be adequately funded and supported, ensuring development of skilled and knowledgeable electoral personnel and fostering transparent and inclusive electoral processes.
Trends and Recommendations

Based on analysis of training practices described above, the following trends can be identified.

1. There has been a growing recognition of the need to establish permanent bodies responsible for providing electoral training and capacity building. These institutions, often known as electoral training centers or institutes, are dedicated to delivering standardized and specialized training programs for election officials, political party representatives, civil society activists and other electoral stakeholders.

2. Increasing integration of technology in our lives, including in education and electoral processes, has led to a growing demand for information technology specialists in election training entities. Soon, training entities in the electoral field may require Artificial Intelligence operations skills as well as capacities for video production, website and learning platform management and design. As technology continues to advance, demand for professionals with expertise in AI operations is likely to grow.

3. Training entities engage a pool of professionals to conduct training programs for election officials while also relying on the involvement of local public authorities and permanent regional and district representatives in organizing training programs.

4. Electoral training is increasingly viewed as an ongoing process rather than a one-time event. Implementation of continuous professional development programs ensures that election officials and other stakeholders stay abreast of evolving electoral practices, technologies and legal frameworks.

5. Categories of election officials enrolled in training programs is growing as well as the requirement for certification of officials at all levels. Election officials are required to complete training programs and meet specific criteria to obtain official certification.

6. COVID-19 compelled changes in training methodology, fast-tracking online delivery and the use of learning management systems, or LMS.

7. Different settings require additional effort in customizing training, such as small rural contexts versus large, densely populated urban areas.

8. Training plans are closely aligned to institutional strategies and identified areas of performance.

9. Mandatory training makes planning predictable and helps with developing clearer strategies and future events by ensuring that all election officials possess a common understanding of essential concepts, skills and procedures.

10. Larger EMBs with established training centers tend to develop their own strategic plans which speak to the institutional vision or a broader strategy.

11. Due to the complexity and scale of training, stronger project management of training and coordination with other departments, such as logistics and operations, is a standard requirement.

12. Training is more self-reliant and on-demand, complementing scheduled group learning with independent learning as the training progresses.

13. Training delivery utilizes diversified aids, scripted lesson plans and online tools from standard slide-deck and training manuals.
14. Incorporating more hands-on training, simulations, scenarios, and in some cases, rehearsals, is increasingly common.

15. Hybrid approaches of mixing online and in-person training has become commonplace.

16. Expanding the learning ecosystem, such as involvement of software vendors for LMS, increases management responsibilities and upkeep of platforms.

17. Trainers provide feedback on training implementation; but, are not closely involved in originating content and approach.

18. In regular elections, trainers form a close natural partnership with capital-based training entities in the developing training plans. Where online learning is common, trainers play an important role in supporting learners in a tutoring capacity and this forms part of their training development.

19. Trainer development is a more significant point of focus now than in the past. Training of trainers is a common feature of training programs, focusing on adult education principles, training administration and management, and evaluation over and above the poll worker training content. Possessing training competence is either core recruiting criteria or is actively invested in by the EMB.

20. Training support goes beyond scheduled training, with regular informal information exchange to ensure engagement in the lead-up to elections and thereafter.

21. Using social media is an invaluable communication tool with trainers in the event of last-minute changes.

22. Complex situations in polling stations warrant additional complementary training approaches.

23. Political polarization, pandemic and tense training contexts require more soft-skills training, such as personal safety and de-escalating interpersonal conflict.

24. EMBs are developing discrete training components for different audiences and timings across the electoral cycle.

25. Learning ecosystems are expanding, with EMBs sometimes training security personnel, political party activists and health workers, to address challenging electoral system elements.

26. Evaluation is the norm for trainers and participants of training, but remains a major challenge due to the large number of persons to be assessed and the availability of funding and technical resources.

27. Evaluation at the point of training is complemented with on-the-job performance tracking.

28. Multiple evaluation approaches, especially those that allow for real-time feedback— such as online trainings—yield a wide variety of data points to drive improvement.

29. More sophisticated training setups have a structured approach to formalizing innovations through rehearsals, pilot programs and lessons-learned.

30. Issues around performance in larger municipalities differ significantly from those in smaller municipalities (research by Kimball et al). There is no “one-size-fits-all” approach to training reforms.

Trends identified in the research reflect the dynamic nature of electoral processes as well as the need to continuously adapt and strengthen the skills and knowledge of those involved in conducting elections. They also demonstrate the ongoing efforts of election management bodies to enhance the quality, inclusivity and effectiveness of electoral training and capacity-building both for permanent and temporary election officials.
and staff. By staying attuned to these trends, stakeholders can better address evolving challenges and requirements of electoral processes and contribute to democratic, credible and transparent elections. The findings of the research allow the Ukrainian CEC to learn from the experience of other countries and build their system of electoral training. There are a few considerations of the research authors that may be useful for the Ukrainian CEC.

Investment in the ongoing training process and building the culture of permanent learning empowers EMBs to provide higher quality and more diverse training to a larger number of election officials at all levels. EMB capacity-building efforts during the post and pre-electoral periods are reinforced by operational training before elections which results in more professional election officials providing electoral services to the population on election day. Other stakeholders, benefiting from ongoing training provided by EMBs, contribute to the integrity of the electoral process and a more evolved political and electoral culture. Methodologically, training should move away from singular “one-size fits all” content, and approaches to cater to soft skills such as leadership and crisis management, displaced persons voting and electoral rights of persons with disabilities.

As the Ukrainian CEC has made the first steps towards centralizing training and capacity-building, this process should be continued and the new Training Centre transformed into an education hub which effectively includes permanent and temporary election officials, CEC members, CEC and regional-level staff and staff from other organizations working in election administration. Consideration may be given to empowering local authorities around the country to become regional logistical support units for the Training Centre. A deep pool of trainers, regionally-based and integrated into the structure of the Training Center is key to successful delivery of training during the electoral period.

Using new technologies in training should be considered one of the Training Center’s priorities. It should take into consideration the CEC’s existing experience in remote learning through an e-learning dedicated platform, several online channels and social media platforms. International experience demonstrates that new technologies help reach a larger number of people in a shorter period of time and provide timely training, including replacement of election officials, evaluating trainees and trainers and monitoring the training process.

Consideration may be given to reinforcing the Training Center with civic education and research. Civic education in a long-term focus and will create a basis for training provided by the Center. The research function will help provide evidence-based civic education and help in designing new programs and adapting existing ones to the needs of beneficiaries. It also relates to the Training Center’s capacity to react quickly to legislative changes and adapt training materials to new electoral realities.
Links to Useful Materials and Documents

1. Australian Electoral Commission Corporate Plan


8. Strategic Plan of the Center for Continuous Electoral Training (CICDE)

9. Strategic Plan of the Center of Electoral Systems Development, Reforms and Trainings, Georgia:

10. Strategic Plan of the State Electoral Commission, North Macedonia


12. UK Performance Standards
References

Australia


Brazil


Bulgaria

- Central Electoral Commission of the Republic of Bulgaria. (2016). Rules for the Organization of the Activities of the Central Election Commission, the Structure and Functions of its Administration. [Link](https://www.cik.bg/upload/143970/%D0%9F%D1%80%D0%B0%D0%B2%D0%B8%D0%BD %D0%B8%D0%BA+%D0%B7%D0%B0+%D0%BE%D1%80%D0%B3%D0%BD%D0%B0%BD%0 %B7%D0%B0%B1%B6%D0%B8%D1%8F+%D0%BD%D0%B0+%D0%B4%D0%B5%D0%B9%D0%BD% D0%BE%D1%81%D1%82%D0%B0+%D0%BD%D0%B0+%D0%A6%D0%98%D0%9A-%D0%BF %D1%B0%D0%B8%D0%B5%D1%82+%D1%81%D0%A0+1832+%D0%BE%D1%82+02072020+%D0 %B3.pdf)
• Central Electoral Commission of the Republic of Bulgaria. (2017, March 26). *Methodological instructions of the Central Electoral Commission on the application of the Electoral Code for the regional electoral commissions, part II.* https://www.cik.bg/upload/71955/MU-RIK-II+chast-%D0%9D%D0%A1+2017+prieti+s+R+4446-09032017-%D0%A0%D0%9A%5C.doc


**Canada**


**Estonia**


**Georgia**

- Great Britain (UK)

**India**


**Mexico**


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Moldova

• Central Election Commission of Moldova. Decision No. 1030 of 09.12.2011 regarding the establishment of the Continuing Education Center in the Electoral Field next to the Central Electoral Commission (2011). (Entire statute)


Nigeria


Norway


Peru


Poland

Romania

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South Korea


Ukraine


General/Other
