2016 GPP Team Feedback

# Overview

This document contains the feedback received from the GPP Team members.

# Will Bakker

## High-level planning

* The GPP Team should begin work no later than the time of the later drafts of the DSP, well before the 30-day comment period. This would improve the practicality of implementing the DSP and
* The following qualifications of the 2016 GPP Team were very useful: a lawyer (or lawyerly thinker), a person with wide experience with DA’s IT systems, a person familiar with the Communications operations of DA at a global and CC level, at least two individuals familiar with previous primaries.
* It was highly beneficial – necessary, in my opinion – that our two individuals with that prior experience in DA primaries did not have a defensive attitude about past practices nor did they seek to re-create them. The team’s ability both to learn and to assess past practices was a great positive.
* The GPP Team naturally become the “experts” on the GPP and it is tempting to drag its members into every DSP-related crisis and question. The International ExCom must either take responsibility for the failures that occur due to pulling GPP Team members away from their work, or ensure that knowledge of the DSP and the GPP’s procedures are distributed across the organization.

## Internal planning of the GPP Team

* The GPP Team accurately assessed the kind of tools and resources that CCs would need. We did not allow sufficient time for our own work *and* we underestimated the demands of CC leaders to have documents well in advance, leading to frustration with our team. Although the late date of the final approval of the DSP exacerbated the problem, we also did not plan the timing well.
* Recording the decisions and judgments of the GPP Team as they are made, for reference or in order to bring volunteers up to speed, would be helpful.

## Creation of resources and communication with leaders

* No matter the number and quality of informal Q&A sessions, individual calls with CC ExComs, or Town Halls, those implementing the GPP (CC chairs, Voting Center Managers) will not take action until they have written and fixed guidance.
* Any uncertainty in documentation or communications with those implementing the GPP will cause them to “wait and see” and not prepare at all.
* I still can’t decide whether we should have produced summaries and brief guides (with the risk that leaders would not read the full documents at all). But it became apparent during the week of Voting Centers that most CC chairs – and too many Voting Center Managers – simply did not read the Guides. And almost none read the DSP itself. I am not willing to admit that they are incorrigible and so I hope there is a strategy that works, whether it focuses on reward or punishment.
* The opportunities for WebEx Q&A and verbal presentations, as arranged by the International Chair, CC leaders, and RVCs, were frequent and reasonably well-attended. It is no surprise that those most in need of guidance professed not to know about those opportunities. Although it seemed to be a distraction from finishing GPP Team work, I believe that every one was worthwhile, if only for the goodwill and confidence generated across the organization.

## Voting by email

* Voting by email required a massive amount of labor, including constant, draining work before March 1 and then an emergency scramble through March 21. I believe that the ballots could be processed in a less labor-intensive way, although I believe that would require much more planning and testing than this GPP Team was able to devote to it. If there is no such way, then dozens of volunteers should be recruited, trained, and tested at least a week before the end of the period of email voting.
* Despite a great deal of care, the ballot proved confusing to so many voters that I must conclude that the ballot (or the DSP that required all those fields) could be improved.

## Performance of Country Committees

* Several Voting Center Managers did not become familiar with the rules, guides, or documents until the last minute (or never consulted them at all). Either CC chairs must be held accountable before the Voting Centers begin or some group must oversee all the Voting Center Managers individually (either the RVCs or a group with the authority to sanction). Early warnings and interventions would have eliminated many problems during the week of the Voting Centers.
* The DSP must include a mechanism to hold CCs accountable for running Voting Center according to the rules. This would include the authority of the International Chair (or equivalent) to investigate, requirements of due process, and explicit consequences on a scale that allows for mitigating circumstances. (That is, not just a “nuclear” option or nothing at all.) This must be in the DSP and made mandatory, because the internal and external pressure to deviate from accountability will be intense.
* The country committees proved incapable of planning for and performing the administrative tasks in the database that were required by our processes for tabulation and verification, which led to the adoption of hasty work-arounds that introduced errors and uncertainty into the process.

## Tabulation

* The nature of tabulation depends on the methods of voting, which inevitably change from primary to primary. Adaptation to the volume of turnout and to the kinds of errors and irregularities observed when we finally received the ballots is obviously necessary. Our team of volunteers and their leaders on the GPP Team (along with the International Secretary and the International Chair) adapted well to preserve the spirit of the DSP’s rules and to accommodate the widely varying practices across the globe.
* More planning for the mechanics of tabulation, and more review of the plan by multiple knowledgeable people, would have saved a lot of wasted labor, reduced confusion, and more accurately set expectations regarding accuracy and the need for short-term volunteers. That planning will take place while the GPP Team is preparing resources and helping Voting Center Managers, so it will require assigning leaders before the entire team goes into crisis mode.

## Dependence on other global committees

* The organizational requirements of Global Primary are far more demanding than normal DA operations and failures are far more catastrophic. The GPP Team, particularly myself, tended to communicate and secure those requirements by the usual, informal methods of cooperation among long-time peers. In several cases, the lack of clarity or indefinite expectations for existing committees or teams led to series failures: the bandwidth cap on March 7, the lack of AA-focused communications, {}.
* The GPP Team cannot be a mere steering committee, because that leaves the entire process too vulnerable to other global groups. Those groups are accustomed to the low-risk nature of operations for 3.5 years out of 4 and may not be capable of fulfilling or even appreciating the demands of a global primary.
* For this reason, the GPP Team must have the capacity and the authority for oversight over global groups upon which it is dependent, particularly regarding IT systems and relations with Country Committees.

# Tom Schmid

Below are my general thoughts on the GPP process. Basically, I think we did a fantastic job. My biggest criticism is the timing of the release of our guidance (although I understand the realities we faced). This GPP was an outstanding success; I believe that being prepared earlier for the next GPP will be one of several ways to greatly expand voter turnout. For each day that we release our guidance earlier, that gives the GPP Team, country committees, VCMs and volunteers an extra day to focus on issues such as training, promotion, alignment of expectations, etc.

1. Our work on the GPP was an enormous task, but we started too late. Most of our guidance came out after the deadline for selecting voting center venue.  Because the GPP happens at distant intervals, much of the previous knowledge is forgotten or lost. Having a better understanding of the voting center requirements in advance of venue selection should ensure that appropriate venues are selected and should enhance the administration of the voting center. That said, our VCMs in Japan, and I’m sure around the world, did fantastic jobs of coming up with ways to make sure they complied with the voting center rules.
2. Our written guidance was excellent, and I believe it was very helpful to Voting Center Managers and volunteers. If the guidance would have been ready before the venue selection deadline, I think it would have been easier to recruit volunteers in advance and potentially open more voting centers than we had.
3. Ballot Requests: We received no ballot requests in Japan. Based on Japan’s experience, I would consider revisiting the ballot request process. Did anyone receive requests for mailed ballots? If so, would directing the individual to the DA website have solved the problem? I admit that there is probably wisdom in keeping a formal process, but perhaps we can streamline it somehow. I regret that I have no specific ideas to recommend.

RECOMMENDATIONS

1. GPP Standing Committee: The GPP Team should be established as a DA standing committee. Responsibilities should include: (1) maintaining records of past GPPs; (2) researching, analyzing and reporting on voting issues, trends, technologies, legal issues, etc. that are relevant to DA; (3) proposing text for inclusion in future DSPs; (4) conducting impact assessments of changes to DA rules or policies to advise the Excom as to whether the change will impact future GPPs; (5) drafting documents related to the implementation of the GPP; (6) continuous promotion of the GPP to DA membership.
2. Membership: As discussed during our Skype call, I think the GPP should weigh in on DA membership requirements to the extent that they impact the GPP and the voting process.
3. Voting Technology: With due regard to our very serious concerns about e-Voting or any system that lacks a verifiable paper/document trail, DA should stay on the forefront of voting technology. When reliable technology is available, we should strongly consider using it. Obviously, this research must be done well in advance of the GPP.
4. Disaster Planning: The current DSP seems quite optimistic that everything will go very well, and fortunately it did.  However, the process might benefit from doing some thinking about how we will handle a situation that goes very wrong.  Perhaps some procedures should be worked into the DSP, or perhaps we should simply maintain an internal disaster plan. As I think through a scenario or two, I have far more questions than answers.
5. Guidance on Tallying E-Mail and Fax Remote Ballots: The solution to counting the electronic ballots was fantastic, but I don’t think we say we had that planned out in advance. In the future, if we decide to use the same process, we should prepare written guidance on the tallying of electronic ballots.
6. DSP drafters should avoid imposing inflexible, arbitrary dates for the certification of DA members as qualified voters for the GPP. Such deadlines risk disenfranchising voters by depriving new members who join after the certification deadline of the ability to vote by remote ballot. Further, such deadlines increase the risk that new members who join after the certification period will be required to meet a substantially higher burden to join Democrats Abroad by being required to join in person at a voting center. To the extent that such certification dates are used, they should be as close to the first day of the GPP as possible.
7. Future GPPs should minimize the use of voter ID to the greatest extent possible.  However, new members who join Democrats Abroad at a voting center during a GPP should be required to present some form of identification sufficient to establish that the voter is, in fact, who he or she claims to be.  This is because the voter’s request to join Democrats Abroad and to receive a ballot is the first contact between the voter and DA. Documents accepted for the purpose of establishing the voter’s identity should be defined as broadly as possible (e.g., ranging from a utility bill bearing the voter’s name to student ID, residence card, passport, etc.).  To ensure that new members joining at a voting center are not subjected to a substantially greater burden of becoming a member than most of our members who join online, voting center rules should make it clear that it is only the voter’s identity that is being confirmed.

I know our work is not done, but I would like to take this opportunity to thank all of you for your patience, your input and your guidance throughout the GPP process.  I’ve learned a lot from all of you and benefited from your long experience working with DA. On top of that, it was a pleasure to work with you all, and I look forward continuing our work as necessary.  Hope to meet you all in person in Berlin, and talk to you soon on our next call.

# Shari Temple

My overall evaluation of the GPP is that it went extremely well considering everything that was required to make it a success. It was also an extremely labor-intensive process to execute all the steps needed.

It brought in lots of new members which is good for DA.

Below are comments on what went well, what needed improvement and recommendations to consider for 2020.

## GPP Team

### What went well

We had a nice balance of skills and knowledge on the team. It was helpful that Will had been one of the drafters of the DSP.

### What could have been better

It would have been nice to have had someone from the Americas on the team despite that would have added complexity to the timing for calls. It also would have been nice to have had the planned ED to help with some of the tasks.

Although the team started almost 5 months before the GPP, there was still a rush to get everything done as early as many of the leaders would have liked. Having more time would have been helpful.

### Recommendations for 2020

1. Establish the team or at least the leader at the same time as the DSP team. Make sure the GPP chair is part of the DSP team so all GPP related items can be incorporated and understood by the GPP chair.
2. Have the team fully established at least 6 months, preferably 9 months, before the GPP remote voting starts.

## Training and Communications

### What went well

The GPP Team (particularly Will) did a great job in providing information about the GPP via email, training sessions, wiki, and website. There were also videos created by non-team members that were shared with others.

The Comms Team did a great job publicizing the GPP.

### What could have been better

Not all leaders and voting center managers read the communications nor the voting center guides. There were too many that did not take it as serious as needed so did not attend training nor listen to recordings of the training.

There were some members that had already voted in their state primary before hearing about the GPP.

### Recommendations for 2020

1. Make the process easier where possible
2. Make attending at least one training session a requirement
3. May want to consider having a required certification test for all voting center managers to pass (like the IT team is now using for database admins).
4. Have a regional go-to person for GPP questions outside of the GPP team
5. Post all key emails sent to leadership in a separate area on the Wiki so easier for leaders and voting center managers to find all relevant emails and material in one place
6. Announce the GPP much earlier to all members even if dates have not be set

## Remote Ballots

### What went well

There was an excellent turnout of members voting with remote ballots.

### What could have been better

The remote ballot process was the area with the most problems.

* The initial ballot created had a clause that stated anyone signing the ballot would automatically become a member. This was removed based on the confusion and work it would have caused a couple of weeks after the ballots first went out.
* Some people had problems printing the ballot.
* There were strange characters on some ballots until a new version was created with a different font.
* Many people did not read/understand the instructions and ended up with spoiled ballots by filling it out wrong.
* Many emailed the blank ballot rather than the signed ballot. We notified some as we had time but not all.
* There were fields marked required that were not required in the DSP (i.e. Voting State). There was inconsistent handling on this on whether it was spoiled or not.
* The fax process was not fully working right at the beginning.
* Often received the same faxed ballot multiple times
* Many members submitted an email ballot and then mailed the original. Not all duplicates were probably caught.
* Some people’s handwriting was impossible to read – particularly on ones sent with bad scanned copies
* Not all people understood they had to join DA before voting
* Many joined and then voted with no time for the countries to approve the member
* The tabulation and tagging process for email/fax ballots was very time consuming and subject to error
* Multiple people required to process the email/fax ballots – not all following the same process and criteria for spoiling ballots
* Lots of questions about the ballot and difficult to answer in a timely manner
* Questions were intermixed with the ballots making difficult to find/answer

### Recommendations for 2020

1. Need to find a more automated way for remote voting and remote ballot tabulation
2. Need multiple people available to answer members’ questions

## Voting Centers

### What went well

I did not attend a voting center this year so my comments are about the process. The voting centers all received a Voting Center Guide and Checklist that covered most of the topics and potential issues well.

### What could have been better

* Lots of waivers requested after the deadline for the Voting Center dates and locations
* Providing the voting center guide earlier was a common request from most countries

### Recommendations for 2020

1. Make sure information about what locations are good for voting centers is provided to the countries well before the deadline for the submission of the dates and locations.

## Tabulation Process

### What went well

Most voting center managers and country voting wardens provided their results in a timely manner. The team in Prien that did the final tally check worked well together despite the long days and time it took to do the process.

### What could have been better

* Lots of mistakes on the tallies sent in by the committee countries
* Took way too much effort to check the ballots at the global level
* Some of the ballots did not arrive in Prien until after the deadline
* Ran out of time to tag all of the voting center votes so there may have been people that voted both remotely and at a voting center
* Some of the countries did not enter their new members that joined at the voting center

### Recommendations for 2020

1. Need way to make sure that the country committee tabulations can be used without a complete review of their tabulations
2. Ask countries not to staple ballots together
3. Make sure that ballots are in a scan-able format

# Michelle Taube

## Communication

### What went well

The special webex calls about the GPP and running a VC were very useful. The FAQs on the website were also handy.

### What did not go well

From another viewpoint, many voters were still confused about what they were voting for and how their votes would count (many wrote on the remote ballots which district they vote in back home so we could send a vote home...?) They are now sharing their confusion with their local election officials.

### Recommendations for 2020

Communication to CCs and VC managers seemed to work if those people took an interest. I'm not sure how to improve communication to voters -- more FAQs on the website and social media?

## Training and Documentation

### What went well

We had very detailed guides for VC managers and instructions for remote voting.

### What did not go well

The guides were a bit too long and some of the documents were ready too late.

### Recommendations for 2020

Somehow make the wording about residence address and voting address clearer, so voters will not include the same information in both boxes (esp. on in-person ballots). Change the wording on the remote ballot, so people will not vote without joining. The "optional" after membership number seemed to confuse some voters.

## Remote Ballots

### What went well

I think we made it really easy to vote remotely by allowing voters to return the ballot by email attachment.

### What did not go well

It's not easy to count that many ballots. Also, we didn't understand in advance how much responsibility the Remote Ballot Warden would have when we were asked to choose one. We might have chosen someone else if we had known.

### Recommendations for 2020

None

## Voting Centers

### What went well

Things went fairly smoothly in the VC, even with the overwhelming number of voters who showed up. We had the forms and ballots that we needed.

### What did not go well

The website join form was a little wonky at times. We had a few voters who we had to contact later to make sure they joined. We also had voters show up from other country committees. In the crush of new members, we didn't realize that voters were trying to vote in a country they didn't live in.

### Recommendations for 2020

None

## Tabulation

### What went well

The tally sheets -- for both VC ballots and remote postal ballots -- were clear.

### What did not go well

None

### Recommendations for 2020

None

## Ballot Declaration Statement

About the ballot declaration. I understand why this sentence is necessary and why it's somewhat vague:

"I have not participated and will not participate in the delegate selection process (caucus, primary or other method) of any other delegation to the 2016 Democratic National Convention or in the nominating process of any other political party for the corresponding elections, nor voted in any other manner in the Democrats Abroad Primary."

I'm just wondering if it can be written in a more accessible way.

The Maryland state declaration, which I had to sign when I requested my absentee ballot, says: "I am not registering, requesting a ballot, or voting in any other jurisdiction in the U.S." California's is similar: "I have not applied, nor intend to apply, for a vote-by-mail ballot from any other jurisdiction for the same election"

I don't know if something simple like: "I have not voted, nor intend to vote, for President nor have I/will I participate in the selection of delegates to the Democratic National Convention in any other jurisdiction." would pass legal muster...

## Other

I'm glad we survived it.

# Bill Barnard

First, I want to thank the other members of the GPP team. I have never worked with a committee so dedicated and determined to make a difficult process work—and to do so in a genuinely congenial and mutually helpful way.

Second, I want particularly to thank Will and Shari. Will’s ability to see the larger implications of our efforts and, as shown in his own comments in this submission, his ability to keep a critical awareness of the strengths and weaknesses of our process while always moving it forward is truly impressive. As is Shari’s capacity and willingness for hard work. We all have benefitted from her competence and perseverance.

As is always the case, there are things we can do better. Clearly an earlier start is critical, as is (I believe) the involvement of the chair of the GPP committee and perhaps a few other members in the drafting of the DSP. They need not be official members, but simply being aware of what it contains and what the implications for implementation are likely to be would be immensely helpful. Will’s role in drafting and his awareness of the DSP detains was indispensable this year

Clearly, we need to get the relevant documents, the Guides, and the requirements for Voting Center sites out earlier and to make even further efforts to insure that they are understood and acted upon in a timely manner. There is an equal need to insure that country committee chairs and chapter chairs fully understand AND accept their responsibilities. We will never succeed fully in a volunteer organization, but local leaders must take on board the seriousness of what we are about in conducting a global primary in the U.S. Presidential selection process.

Specific suggestions:

In re the ballot itself. Should we rethink what is required on the ballot. There was a good deal of confusion in terminology. There were many faulty responses to the required blanks on the ballot. It is clear that we need to give further thought to what we require. Can we be clearer in what is being asked for. In our Committee discussions, there was a question raised about why we collected certain information on the ballot, information that in current practice is not used (though some of it might be useful if ballots were eventually returned to the cc’s.)

NOTE: A decision has since been made to return copies of the ballots to the CC’s, which will permit them to use the information to update their membership records.

Would it be useful to develop a commonly understood work­around for those who join after the official membership list is circulated to cc’s, a workaround such as that devised on the day by Edinburgh and Cambridge chapters and apparently elsewhere as well, for having prospective voters who are not on the official list, check to see if they have received a membership number. That would still leave those who had not yet been processed. This problem was a major one for those Voting Centers that had large turnouts.

Again, it was a privilege to serve with this committee. My profound thanks to Will, Shari, Tom, Jim, and Michelle.