I WELCOME AND OVERVIEW

Welcome to the project! This promises to be a very exciting and challenging couple of months. A consortium of media organizations from across the country has contracted NORC to code the disputed undervote and overvote ballots in each of the 67 counties in the state of Florida. For the purposes of this research, we will only be coding the two statewide races: the presidential race and the senatorial race. There are approximately 180,000 ballots to code in all. Our job is not to perform an election recount, but to code our observations of the marks on these particular types of ballots to help with future understanding and improvement of the validity and reliability of voting systems nationwide. You are not being asked to decide whether any ballot has a vote or does not have a vote, simply to describe and classify what you see on that ballot.

We are viewing the ballots under Florida law 101.572 which states:

> Public inspection of ballots. The official ballots and ballot cards received from election boards and removed from absentee ballot mailing envelopes shall be open for public inspection or examination while in the custody of the supervisor of elections or the county canvassing board at any reasonable time, under reasonable conditions; however, no persons other than the supervisor of elections or his or her employees or the county canvassing board shall handle any official ballot or ballot card. The supervisor of elections shall make a reasonable effort to notify all candidates whose names appear on such ballots or ballot cards by telephone or otherwise of the time and place of the inspection or examination. All such candidates, or their representatives, shall be allowed to be present during the inspection or examination.

A. Project Staffing Structure

The table below outlines the field staffing structure for the project. We will have 20 teams of three coders, with the team leader supervising. The team leader is an experienced NORC employee. The coders will be temporary hires from the local areas in Florida.

B. County Information

Contact information for each of the 67 counties in Florida is contained in a cumulative database that will be loaded onto your laptops. County name, contact, and number/type of ballot are only some of the variables that are included. Appendix I contains a cumulative list of county officials who will serve as contacts for this project.

C. Glossary of Terms

Below is a list of terms you will need to understand in order to code correctly.

Chad	Pre-perforated rectangle designed to be detached under pressure of a stylus in indicate vote choice
Chad area	The region delineated by lines of ink around a chad; contains numbers from 1 to 312
Dimple	Dent in chad or chad area in which chad has not been detached from any corner
Sunlight	Light viewed through a ballot as the result of a dimpling on a chad or perforation off the chad
Detached corner	Chad separated from the rest of the ballot at the corner of the square or rectangle (1, 2, 3, or 4 corners may be detached)
On border	On the printed line between two chad areas
Within border	Inside the border of a chad area, ***but not on a chad***

II CODING

A. Ballots and Codes

There are several different types of ballots used for the various counties in Florida. Consequently, there are different coding forms for each type of ballot. Oftentimes, there are subtle differences for the coding schemas for the ballots as well. The ballots and their coding schemes are covered here in the manual, as well as in job aids, and live samples from clients.

1	Votomatic	Most ballots in Florida are votomatic ballots. These types of ballots are also used in Cook County, IL, (Appendix A). These ballots are cards where the chad for each vote selection is punched out manually on an individual basis. These punchcard ballots do not have any candidate names or identification on them. They have only chad numbers. All information is identified by chad number. Any ballot that identifies candidates by hole number is votomatic.

The codes for a votomatic ballot are listed below. They are ordered from least detached to most detached.

Label	Code
Blank (no mark seen)	**0**
Dimpled chad, no sunlight	**5**
Dimpled chad, sunlight	**6**
Dimple with or without sunlight, off chad, within borders	**7**
Dimple with or without sunlight, off chad, on border above	**8**
1 detached corner	**1**
2 detached corners	**2**
3 detached corners	**3**
4 detached corners	**4**

2. Datavote — This type of ballot is also a card, but voters make selections by pressing a lever that punches out the chads mechanically. A fictitious sample of this type of ballot from "Sunshine County", FL, as well as a real example from Gilchrist County, FL, are located in Appendix B. These punchcards have the candidate names and party information on them. These punchcards do not have any chad numbers on them.

The codes for absentee Datavote ballots are the same as the codes listed above for votomatic ballots. However, the codes for non-absentee datavote ballots are different. They are listed below:

Label	Code
Blank (no mark seen)	**0**
Punch between the lines	**4**

3. Optical Scan — Most counties in Florida use the optical scan type of ballot. One example, Leon county, can be viewed in Appendix C. For these ballots, voters fill in the oval that corresponds to their vote choice. Another type of optical ballot asks voters to complete the center section of an arrow that points to the candidate's name. On both types, a machine reads the filled selections electronically.

NOTE: We do not yet have complete information on the codes for optical scan coding. Please note that Appendix F contains only a DRAFT version of the coding materials.

A. Coding forms

Information about the coding forms can be found in appendices D through F of this manual as well as in your Job Aids. At the top of every form, there are fields for county name and FIPS code, precinct number, page number, team ID number, date, coder ID number, as well as coder first and last name. Next, there is a section to circle the ballot type (whether overvote or undervote).

1. Organization of Forms

   In general, the forms are arranged as a table, with ballots listed across the top and the chad codes (representing candidates) listed down the side. First, each precinct will have its own set of forms. Second, we expect that each type of vote (undervote and overvote) will be separated within precinct. (This may not be the case everywhere.) Each type of coding form accommodates 10 ballots. They are numbered 1-10 on each form. Ballot number, therefore is dependent on the page number. For example, if there are three forms for undervotes in a given precinct, the first page would contain ballots 1-10, the second would contain ballots 11-20, and the third would contain ballots 21-30. The team leader will be responsible for coordinating the ballot and page numbers.

2. Coding Ballots

   Once an observation has been made for a given chad, move across the form to find the column of the ballot that corresponds to the number of the ballot that you are coding, and then move down the form to find the row that corresponds to the appropriate chad. The straight edge ruler provided in the training materials will be helpful in this task. Once the correct field has been located, enter the code in that box that best represents your observation and is consistent with the coding scheme for that type of ballot.

   When coding more than four “0”s in a column for a single ballot, the first and last “0" in the sequence can be connected by a vertical line, as opposed to filling in “0" in every field. Use this notation for only large runs of “0”s so our data entry staff does not confuse a connector line for a code of “1”.

3. Special Codes: Other Dimple/Write-in/Notes/END

At the bottom of the form, there are additional fields for “other dimple?”, “write-in?”, and “notes”.

For“other dimple?”, circle the “Y” or “N”, to indicate whether any other chads on that particular ballot are dimpled.

For“write-in?” on votomatic ballots, either indicate that a number (#) represents the fact that a vote was cast for a write-in candidate, or that the ballot was pink (P) and thus indicates that a vote was cast for a write-in candidate.

For datavote ballots, indicate whether the vote was cast for a write-in candidate. For the presidential election only, also record the first four letters of the voter’s choice for president.

For the “notes” section, enter any verbatim comments as they appear on the ballot. In the note, be sure to indicate the ballot and chad number that correspond with the verbatim. Also, circle the ballot number above that correspond to the notes.

When you are done with one type of vote for a precinct, write END on the line for the first chad of the next ballot.

4. Differences among the coding forms

Votomatic form has a portrait page layout; datavote has a landscape page layout.

Votomatic chads are listed by number and separated by column status as they appear on the ballot; datavote chads are listed by candidate party and separated by type of election (presidential or senatorial).

For the votomatic “write-in” column, circle “#” if a number is listed or “P” if the ballot is pink; for datavote ballots, indicate that a vote was cast for a write-in candidate, then only for the presidential race, indicate the first four letters of the candidate’s name.

Optical scan coding forms, with the exception of the codes themselves, are almost identical to the datavote coding form. However, we do not have complete information on the optical scan forms at this time.

III ISSUES TO KEEP IN MIND

A. GENERAL ISSUES:

1. Timing is critical! We must be under or just at one minute per ballot. Collectively, **each team** has only one minute to code the ballot.

2. The team (three coders) will be seated on one side of a table, with the county employee on the other side. The county workers will hold the ballots up for you to view. ***You may view the ballots, but not touch them.***

3. You may ask the county employee to turn the ballot at any time, and in any manner that will better enable you to view the ballot. Do not be shy about speaking up if you did not get a complete look at a ballot or got confused or for whatever reason need to see it again. (KEEP IN MIND ISSUE 1!!)

4. You may not confer about or attempt to confirm what you see with other team members. Coders are responsible for marking down what they see in their independent analysis and are not to be concerned about what other coders see or mark on their sheets.

5. Coders should not have food or beverages near the coding table.

6. There will most likely be several differences among the counties in their reception of our researchers, they way their operations are set up, and their general attitude toward the project. Please keep this in mind and be as accommodating as possible, without compromising the integrity of the project.

B. CODING ISSUES:

1. Be sure to use a new form every time your team starts a new precinct or switches from coding undervotes to coding overvotes. When completing a precinct, be sure to write “end” for the first chad of the next ballot.

2. Please use the straight edge ruler provided in your training supplies when coding to keep your place on the correct line.

3. All coders must use blue ink when filling out the coding forms. The pens are provided in the training supplies.

4. Please be aware of the importance of time. Each ballot should take approximately one minute to code, on average. Obviously, some will take longer and others will not take nearly as long, but this is the goal is to average 1 minute per ballot.

5. Coders will reconcile their positions on the coding forms after every five ballots to make sure that they are all on the same ballot number, chad number, and page number.

6. Light boxes will be provided to facilitate the viewing of “sunlight” through a ballot.