

ELECTION SURVEY REPORT

MARCH 2020 PRESIDENTIAL PRIMARY



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EXECUTIVE SUMMARY

As the fifth largest voting jurisdiction in the United States, preparation for elections in Orange County requires extensive planning and coordination between internal departments, external partners, and community outreach.

At the time of the election, there were approximately 1.6 million registered voters who received a Voter Information Guide and a vote-by-mail ballot. In Orange County, a total of 818,021 ballots were cast for a 50.1% turnout in the March 3, 2020 Presidential Primary Election. Staff successfully recruited 1,050 Vote Center Customer Service Representatives to support 189 Vote Centers located throughout Orange County.

The Orange County Registrar of Voters utilizes survey data to enhance its services, resources, and planning for future elections. By understanding what was successful and what could be improved, data-driven solutions can be implemented to improve the voter experience and likelihood of a successful election.

The March 2020 Election Survey Report comprises data of eight surveys, which include:

- Candidate Filing Survey
- Customer Service Representative Survey
- Delivery Survey
- Vote Center Survey
- Training Survey
- Supervisor Survey
- Facilitator Survey
- Phone Bank Survey

From gathering feedback on a candidate's experience filing their nomination papers to the delivery of Vote Center equipment, the range of surveys allow the Orange County Registrar of Voters to identify specifically what can be improved and what is already being done well.

Additionally, the Orange County Registrar of Voters has been collecting data following each major election, so our office is able to assess the success of certain solutions and whether a challenge we face is an ongoing issue or an issue that is unique to a specific election.

Through our ability to evaluate our performance and services through surveys, the Registrar of Voters continues to strive for excellence in providing the highest quality services to the public, implementing innovative practices to increase the efficiency of election operations, and ensuring that the voting experience is positive for all of Orange County.

Sincerely,



Neal Kelley
Registrar of Voters
Orange County, CA

SURVEY TYPES

The **Customer Service Representative Survey** asked customer service representatives to assess the various components of their experience. The survey was emailed to Customer Service Representatives after Election Day. The survey requested Customer Service Representative input on communication with the Registrar of Voters office, issues encountered at their Vote Center, and their overall experience of serving at a Vote Center.

The **Training Survey** was emailed to Customer Service Representatives after they attended their training. This survey sought to measure training through the identification of trends and similar statements. The survey asked Customer Service Representatives about the effectiveness of the in-class training components, as well as specific training materials, including the Vote Center Handbook. This survey was used to ensure that training objectives were being met and training was adequate to run Vote Centers operations as smoothly and efficiently as possible.

The **Facilitator Survey** was distributed to the Facilitators to rate the quality of their training to serve as a Facilitator, experience training Customer Service Representatives, and materials and equipment provided. Facilitators served an essential function as they were liaisons between the Registrar of Voters and the Customer Service Representatives as they prepared to assist voters at Vote Centers. Responses provided were useful in assessing the overall efficiency of the plan to train Customer Service Representatives.

The **Delivery Survey** asked Vote Center hosts to assess the delivery company that was tasked with delivering election supplies and equipment to their location. The telephone survey asked whether the delivery was on time, the driver was courteous, and if there were any issues. This survey is an important and useful tool used to determine the delivery companies that will be retained in future elections, as the level of service provided can greatly impact the satisfaction of the Vote Center host and their decision to serve again in the future.

The **Vote Center Survey** asked Vote Center hosts about their experiences receiving, storing, and returning equipment and supplies. The survey additionally measured the satisfaction of Vote Center hosts with their level of communication with the Registrar of Voters and Customer Service Representatives, as well as their overall experience serving in the election. This survey was emailed to each Vote Center host after the election, and it was a good indicator of the likelihood of the willingness of the Vote Center host to serve in future elections.

The **Phone Bank Survey** was offered to members of the public who called the Public Phone Bank. Callers were automatically transferred to the survey at the conclusion of an interaction with a Customer Service Agent. The survey solicited feedback on the agent's ability to answer the caller's question, as well as rating the quality of service provided by the agent and the Registrar of Voters office. This data was evaluated daily in order to resolve any issues that may arise regarding the level of customer service received by the general public.

The **Supervisor Survey** was distributed to the Supervisors to rate their experiences leading up to and on Election Day. Supervisors served an essential function as they were liaisons between the Registrar of Voters and the various Vote Centers, aided in troubleshooting, and provided leadership to Customer Service Representatives as issues arise in the field. Responses provided were useful in assessing the overall efficiency of Vote Center operations.

The **Candidate Filing Survey** was provided to candidates who completed filing in our office or online. The survey was used to assess the levels of organization and efficiency, as well as the courteousness and professionalism extended to candidates by staff. Results from this survey were not only used to help ensure that a high level of customer service was provided to candidates filing for the election, but also to identify means of streamlining the intensive filing process.

CUSTOMER SERVICE REPRESENTATIVE SURVEY

Overview

Following the March 3, 2020 Presidential Primary Election, Customer Service Representatives were asked to complete a short survey. The survey solicited feedback from Customer Service Representatives on topics that included their experience working for the Registrar of Voters, the likelihood of future service, and the quality of service provided by the Registrar of Voters.

Data collected from the Customer Service Representative Survey informed the Registrar of Voters' office of the effectiveness and value of services provided to Customer Service Representatives, as well as assisted in the identification of methods to improve elections operations. Survey responses indicating highly rated aspects of the Customer Service Representative experience were based on questions that included the following:

1. Are you a former poll worker?
2. How many days did you work as a Vote Center Customer Service Representative?
3. Did you come to your scheduled set up prior to the opening of your assigned Vote Center?
4. Please rate your set-up experience in each of the following areas:
 - Ease of Unpacking
 - Ease of Layout
 - Site Binder and Set-Up Instructions
5. Please rate us in each of the following areas while working in this election:
 - Hiring and Onboarding
 - CSR Portal (ocvote.com/csrportal)
 - Support from Vote Center Supervisor
 - Support from the Command Center
 - Overall experience working in this election
6. Please identify any difficulties you encountered at your Vote Center.
7. How likely is it that you would work in a future election?
8. Please rate the overall quality of Registrar of Voters service.

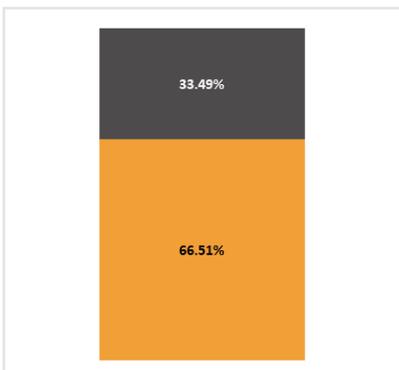
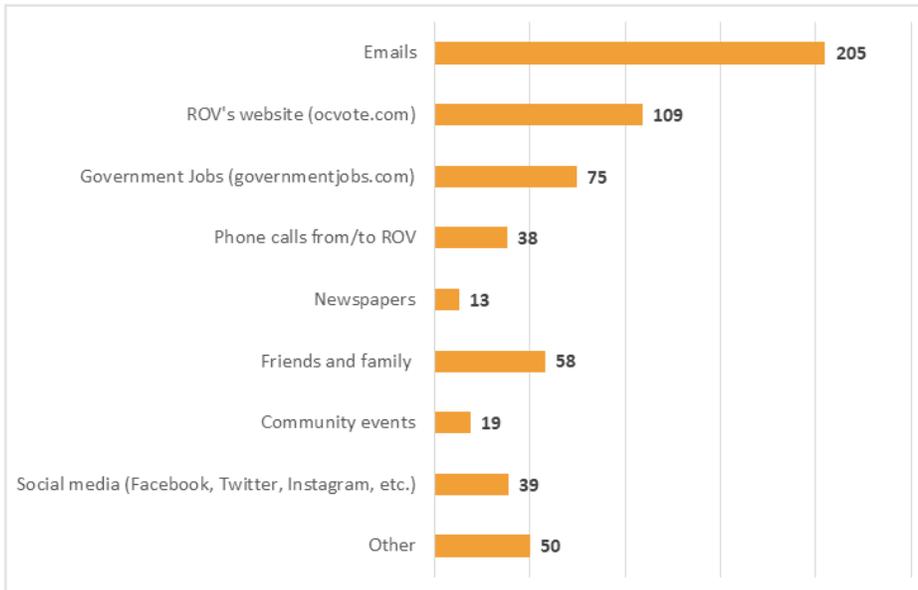


Figure 1. CSR: Are you a former poll worker?

The Orange County Registrar of Voters conducted extensive outreach to its database of over 10,000 past poll workers to share Vote Center Customer Service Representative job opportunities. This was one of the most effective ways to recruit staff that were experienced with elections and the voting process. As evidenced in the chart above, approximately two-thirds of survey respondents indicated that they were a former poll worker.

Chart 1. How did you hear about the job opportunities?



The Orange County Registrar of Voters embarked on an aggressive campaign to recruit 1,000+ Customer Service Representatives for the March 3, 2020 Presidential Primary Election through social media, email campaigns, phone calls, etc. Email (205) proved to be the most effective method of informing individuals about job opportunities that would go on to serve as Customer Service Representatives, followed by the Orange County Registrar of Voters' website (109) and Governmentjobs.com (75).

Following their training, Customer Service Representatives received their Vote Center set-up assignment which included a specific date and time. This provided an opportunity for Customer Service Representatives to meet their coworkers, meet their Vote Center Supervisor, and go over their Site Binder together. The set-up typically took place the day before the Vote Center was set to open to the public but sometimes would occur two to three days before as well.

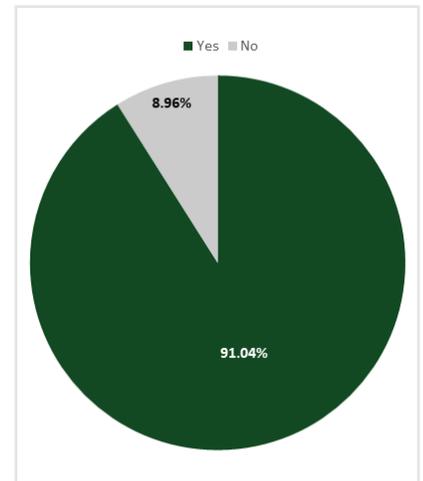
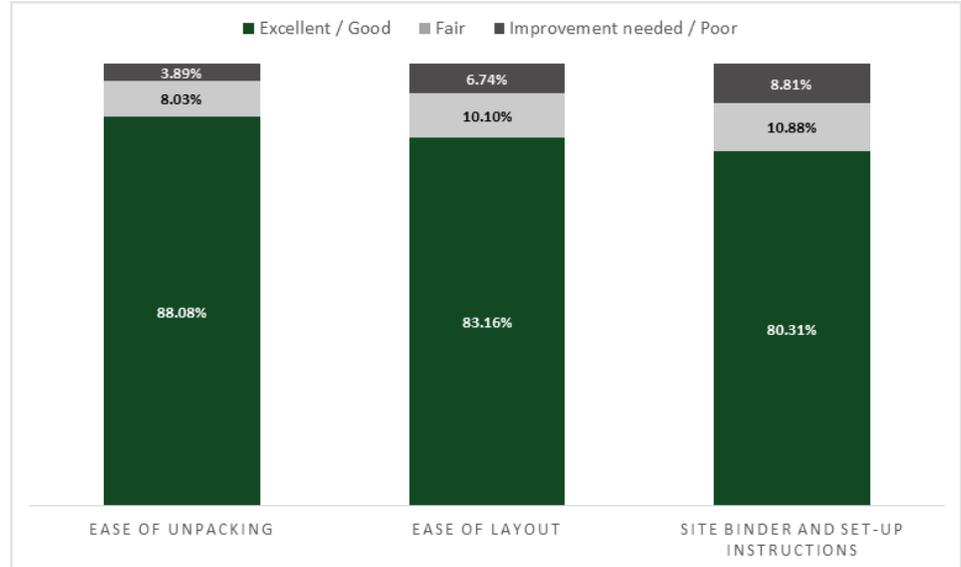


Figure 2: CSR: Did you come to your scheduled set up?

Survey responses indicate a high number of Customer Service Representatives participating in their scheduled set-up, which is critical to have Vote Centers prepared and ready to open on time on the first day of the voting period. This was very different from past polling place set-ups which normally only took an hour during the morning of Election Day.

Chart 2. Scheduled set-up experience



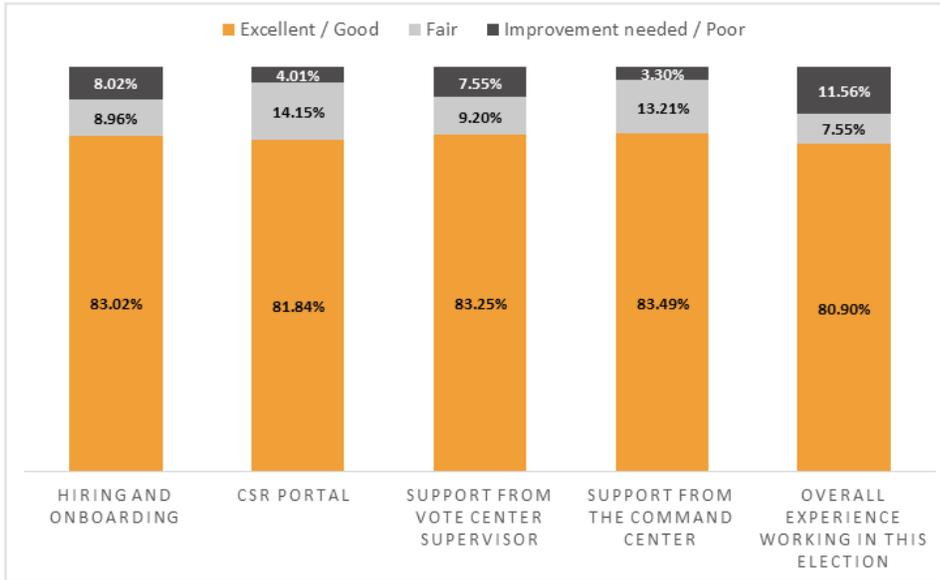
"This whole process has been very impressive. Although we all were trained at different times and by a different group, the message and process of set up and operations stayed the same."

Customer Service Representatives who attended their scheduled set-up were asked to rate the ease of unpacking, ease of the layout, and the Site Binder and set-up instructions. Of the three, the area with most room for opportunity was the Site Binder and Set-Up Instructions. As many updates occurred from the time training materials were developed, the Site Binder was utilized as a tool to relay the information to Customer Service Representatives that was not available or covered during training such as the video conferencing tablet, how to set up the accessible voting booth, and process voters to be compliant with Senate Bill 207, which was signed into law approximately a week before Election Day. The Site Binder and set-up instructions will be evaluated to determine which pieces can be incorporated into other parts of the training so that it is more manageable and approachable in future elections.

Comments indicate that Customer Service Representatives were surprised to see how much equipment was needed to be set up as they had not seen a full Vote Center set-up during their training or at any other point in the hiring and onboarding process. Steps are being taken now to build a Vote Center Lab at the Orange County Registrar

of Voters’ office so that all Customer Service Representatives will have a chance to walk through, process voters, and serve as staff in an environment that emulates an actual Vote Center.

Chart 3. Experience working this election



Overall, a large majority of survey respondents indicated that they had an “excellent” or “good” experience working in this election. Survey questions ranged from their initial experience with the Orange County Registrar of Voters during the hiring and onboarding process, utilizing the online CSR Portal to access their Vote Center and set-up assignments, support from their Vote Center Supervisor and Command Center, and overall experience working in the election.

Of the five areas, the area that has the most room for improvement is the overall experience working in this election for Customer Service Representatives as 11.56% of respondents rated as “improvement needed” or “poor”. Understandably, Vote Centers is a unique working environment which is extensive for a short period of time; many of the Customer Service Representatives are past poll workers, which were used to only one long Election Day instead of a voting period lasting up to eleven days.

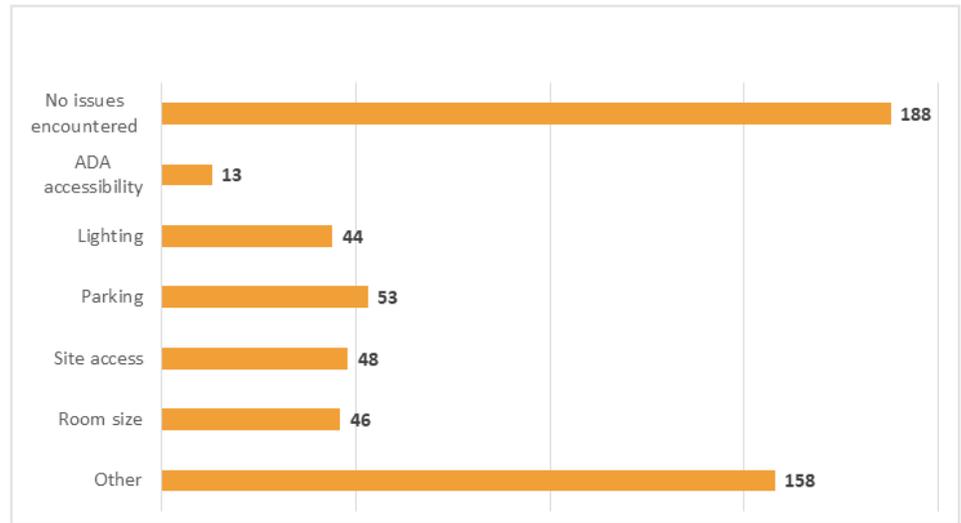
Customer Service Representatives expressed common issues related to their workload, training, and coworkers. Training was conducted throughout the month of February and survey comments reveal that some Customer Service Representatives were surprised by the workload once actually at the Vote Center or by the changes made since their training. Other comments indicate that personnel issues

"My experience with OC ROV was awesome! All personnel from the interview, onboarding, training and support group on voting days were very professional, helpful, and respectful."

at the Vote Center may have also affected their overall experience working in this election.

In order to improve overall experience in future elections, Vote Center training will include best practices and strategies for resolving personnel issues and preparing for Vote Center operations. Additionally, the Vote Center Lab will provide an additional opportunity for Customer Service Representatives to practice their skills and receive any updates in-person.

Chart 4. Difficulties encountered at the Vote Center



While most survey respondents (188) indicated that they did not encounter any issues at the Vote Center, a surprising number of survey respondents indicated "other". Upon reviewing the comments, many Customer Service Representatives indicated issues with challenging coworkers and the workload (17). To address having challenging coworkers (49), training could further emphasize the importance of working as a team and addressing team conflicts. On the matter of the workload being a difficulty at the Vote Center, the flow of voters visiting the Vote Center is not something that can be predetermined but there may be opportunities to increase the number of staffing, possibility of shifts, and encourage voters to utilize the Vote Center Wait Time application to locate Vote Centers with shorter wait times.

Customer Service Representatives also mentioned issues with the facility (54). Responses indicate that some facilities were too hot or too cold or lacked amenities such as a kitchenette. Others expressed dissatisfaction in the quality of the restrooms or availability of electrical outlets. To reduce future facility issues, training can remind Customer

“Training would have been better if we had more time practicing on the actual equipment and in a mock center setting.”

Service Representatives to dress in layers to prepare for different temperatures. During the facility recruitment process, additional notes can be taken to advise which facility may need more extension cords for the voting equipment.

The Orange County Registrar of Voters believes that experienced Customer Service Representatives will provide a better voting experience for voters. Although the March 3, 2020 Presidential Primary Election was the first countywide election conducted under the Vote Center model in Orange County, Customer Service Representative retention will be critical to the success of future elections. More than three-quarters of survey respondents indicated that they would be either “very likely” or “likely” to work again in a future election.

In reviewing survey comments, several patterns were identified as to why some Customer Service Representatives were reluctant to affirmatively answer that they would be willing to work again. These patterns included the long hours for multiple days, insufficient staffing support, and personnel issues. The Orange County Registrar of Voters will review opportunities to improve in these areas to encourage more Customer Service Representative retention.

Figure 4: Overall ROV service



9 out of 10 survey respondents indicate that the service they received from the Orange County Registrar of Voters to be “excellent” or “good”. This is important to maintain at a high level and to continue improving upon so that high customer service can be experienced by Customer Service Representatives and then relayed to voters at Vote Centers.

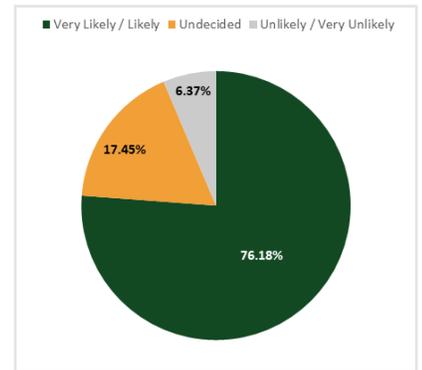


Figure 3: Working in future elections

“I believe the Registrar of Voters did an excellent job in preparing us for our work and presented an efficient process by which voters could cast their ballots.... Looking forward to the next election.”

TRAINING SURVEY

Overview

All Customer Service Representatives were required to attend a training program prior to working at a Vote Center. Training was expanded to a 3-day schedule whereas poll worker training typically took place only on one day for approximately three hours. This change ensured a quality experience for Customer Service Representatives and voters. After completing training, all Customer Service Representatives were invited to participate in the Training Survey. The survey solicited feedback on multiple aspects of training, including the competency and professionalism of Facilitators, the thoroughness of topics discussed, and the quality of training facilities.

The survey included the following questions:

1. In this March 2020 Election, have you transitioned to this role from a different role within ROV (excluding volunteer positions)?
2. Please indicate your level of agreement with the statements listed below regarding your transition:
 - I was provided with my new assignments in a timely manner.
 - I understood my new role at Vote Centers.
 - ROV staff effectively communicated with me regarding my new role throughout the transition.
3. Please rate us in each of the following areas of training:
 - Vote Center Preparation
 - Vote Center Customer Service
 - Voter Processing
 - Daily Responsibilities
 - Hands-On Practice
 - Role Play and Scenarios
4. Please indicate your level of agreement with the statements listed below regarding your facilitators:
 - Facilitators were well-prepared.
 - Facilitators were able to answer all my questions.
 - Facilitators were easy to understand.
 - Facilitators kept class on track.
 - Facilitators made sure that class participation and interaction were encouraged.

5. Please identify any difficulties you encountered at your training facility.
6. Did you receive the Vote Center Handbook?
7. Please indicate your level of agreement with the statements listed below regarding the Vote Center Handbook:
 - Vote Center Handbook is well organized.
 - Vote Center Handbook is easy to understand.
 - Vote Center Handbook clearly communicates procedures.
 - Vote Center Handbook adequately covers training materials.
 - I feel confident in using the Vote Center Handbook to answer questions.
8. Please indicate your level of agreement with the statements listed below regarding your overall training experience:
 - The objectives of the training were clearly defined.
 - The training was well organized.
 - I feel well trained for Vote Centers.
9. Please rate the overall quality of Registrar of Voters service.

Chart 5. Ratings of each training area

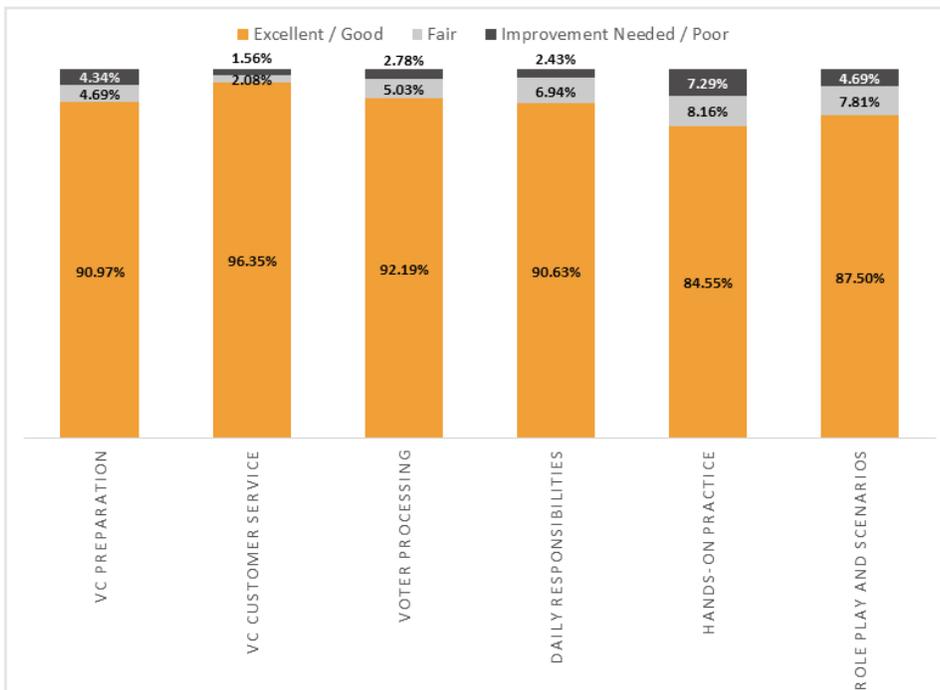


Table 1. Ratings of each training area

| | VC Preparation | VC Customer Service | Voter Processing | Daily Responsibilities | Hands-on Practice | Role Play & Scenarios |
|--------------------------|-----------------|---------------------|------------------|------------------------|-------------------|-----------------------|
| Excellent/ Good | 524 (90.97%) | 555 (96.35%) | 531 (92.19%) | 522 (90.63%) | 487 (84.55%) | 504 (87.50%) |
| Fair | 27 (4.69%) | 12 (2.08%) | 29 (5.03%) | 40 (6.94%) | 47 (8.16%) | 45 (7.81%) |
| Poor/ Improvement Needed | 25 (4.34%) | 9 (1.56%) | 16 (2.78%) | 14 (2.43%) | 42 (7.29%) | 27 (4.69%) |

"I like the hands on practice or role play scenarios. It makes the dense procedures in the handbook easier to understand."

Survey respondents were asked to rate areas that were covered in training, including: Vote Center preparation, Vote Center customer service, voter processing, daily responsibilities, hands-on practice, and role play and scenarios. Four areas received ratings over 90% but areas that could be improved upon include Hands-on Practice (84.55%) and Role Play and Scenarios (87.50%).

Based on comments, Customer Service Representatives expressed a desire for more voting equipment in training to receive more hands-on practice. Similarly, Customer Service Representatives in larger training classes had fewer opportunities to participate in role playing and scenarios to practice voter processing. Steps are being taken to reduce the amount of lecture-style learning and increase the opportunities for hands-on practice in training. In future trainings, Customer Service Representatives will be able to role-play in more practical scenarios based on actual situations that occurred during this election.

Chart 6. Quality of Facilitators

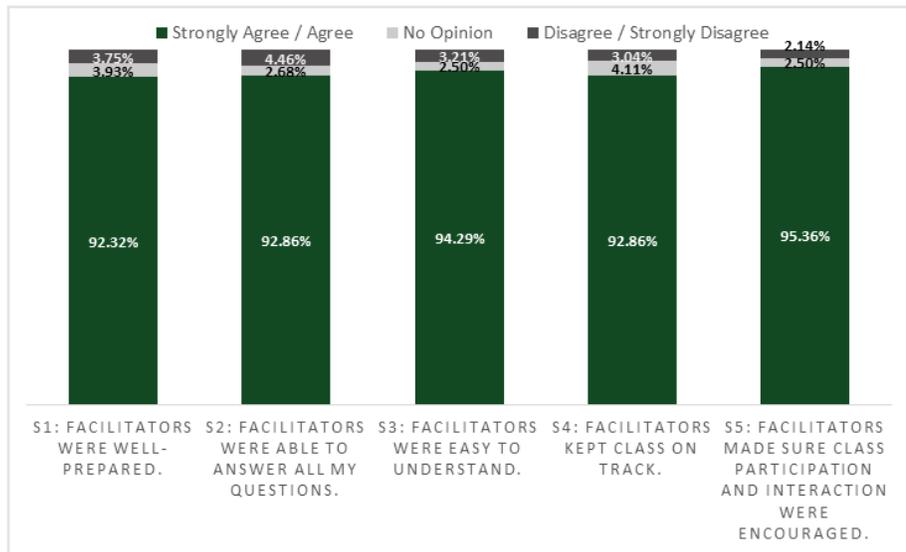


Table 2. Quality of Facilitators

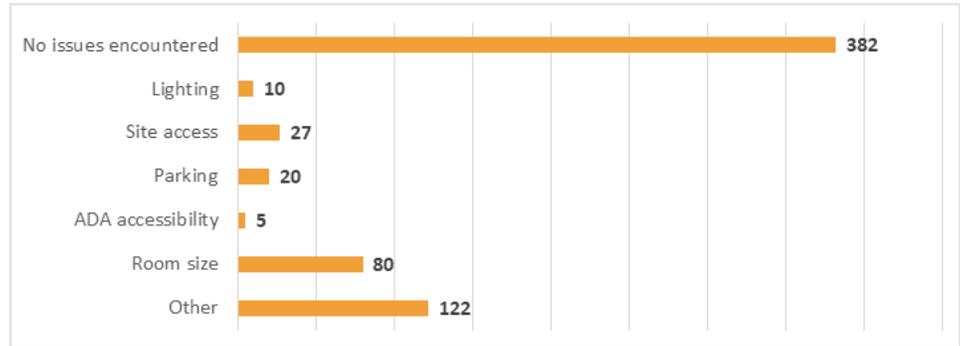
| | S1: Facilitators are well-prepared. | S2: Facilitators were able to answer all my questions. | S3: Facilitators were easy to understand. | S4: Facilitators kept class on track. | S5: Facilitators made sure class participation and interaction were encouraged. |
|-------------------------|-------------------------------------|--|---|---------------------------------------|---|
| Strongly Agree/Agree | 517 (92.32%) | 520 (92.86%) | 528 (94.29%) | 520 (92.86%) | 534 (95.36%) |
| Fair | 22 (3.93%) | 15 (2.68%) | 14 (2.50%) | 23 (4.11%) | 14 (2.50%) |
| Poor/Improvement Needed | 21 (3.75%) | 25 (4.46%) | 18 (3.21%) | 17 (3.04%) | 12 (2.14%) |

A key component of the training experience for Customer Service Representatives involves the quality of the Facilitators. Customer Service Representatives were asked to rate their Facilitators on whether they were well-prepared, able to answer their questions, easy to understand, kept the class on track, and made sure class participation and interaction were encouraged.

Across these five categories, Customer Service Representatives overwhelmingly responded positively that the Facilitators were able to succeed in these areas. Of the five areas, the area with the most room for improvement was whether Facilitators were well-prepared. Based on the comments provided, Customer Service Representatives felt that the Facilitators were not as prepared to consistently provide informed answers and were not always successful in maintaining a positive learning environment. Comments indicated that the size of the classes could overwhelm the facilitators and easily become chaotic. Other comments indicated that the facilitators did not receive thorough training to be able to answer all questions about Vote Centers. This feedback will be incorporated into the training the Orange County Registrar of Voters provides to its Facilitators in future elections.

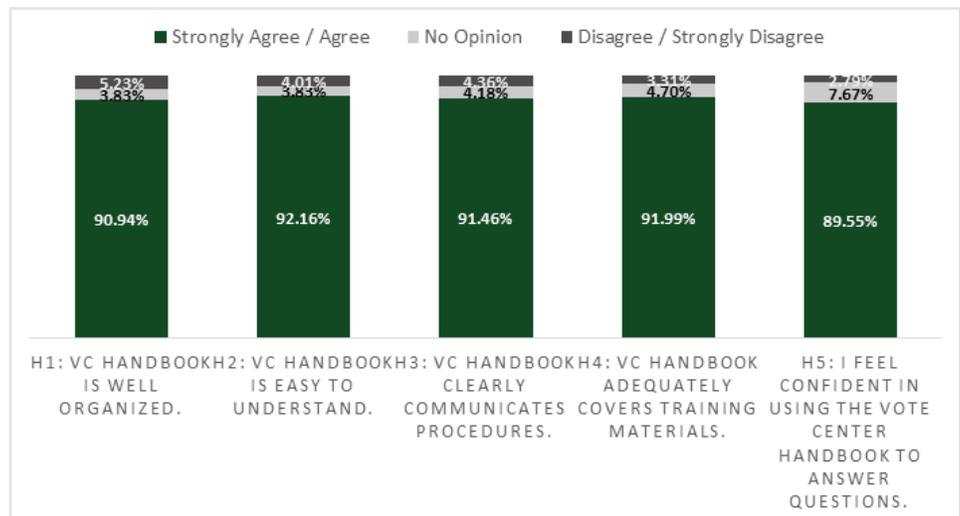
"[My facilitators] were all excellent trainers. They presented a lot of material, but reviewed it sufficiently to give me confidence that I can give excellent customer service at the Vote Center."

Chart 7. Training - Difficulties encountered at training facility



Survey respondents were also asked what difficulties, if any, were encountered at their training facility. An overwhelming majority of respondents indicated that they did not encounter any issues at their training facility (382 respondents). In reviewing comments where respondents indicated “other” (122), 30% of these respondents indicated an issue with the temperature at the training facility and 16.36% reported that the class size was an issue. Regarding the issue with the temperature at the training facility, messaging can be enhanced for future elections to encourage Customer Service Representatives to wear layers as temperature settings at training facilities will vary from site to site and is a personal preference. Class sizes grew for training classes scheduled closer to the voting period as recruitment picked up and there were fewer Facilitators available as some transitioned to serve as Supervisors. Planning can be done in the future to increase the number of Facilitators to account for some transitioning to serve as Supervisors and attempt to spread training assignments more evenly.

Chart 8. Quality of Vote Center Handbook

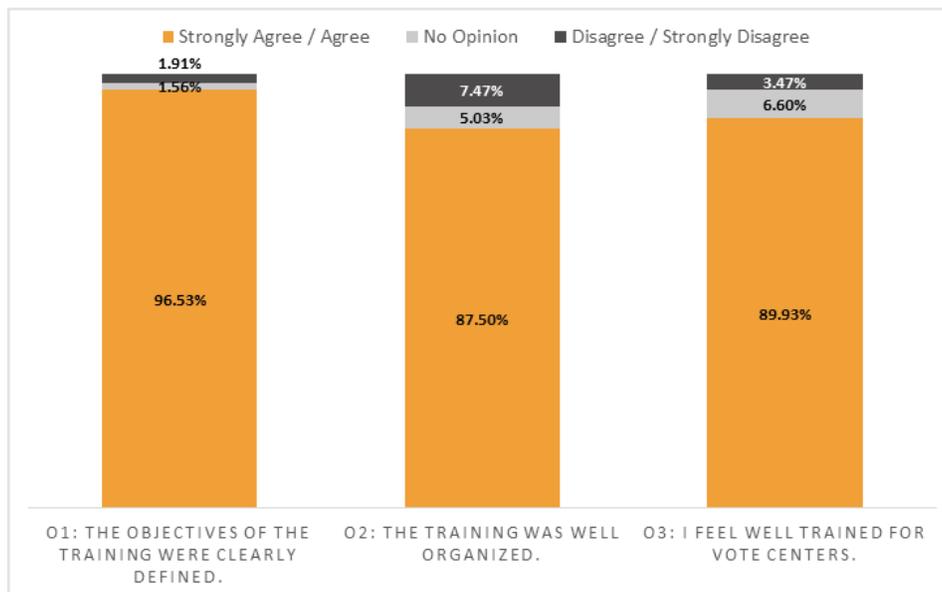


Every Customer Service Representative received a Vote Center Handbook during their training. The Vote Center Handbook was developed to serve as a supporting material during training, as a reference guide after training, and as a resource at the Vote Center. Survey respondents were asked to rate the Vote Center Handbook on whether it was well organized, easy to understand, clearly communicates procedures, adequately covers training materials, and if Customer Service Representatives felt confident using it to answer questions.

"The Handbook is rich, well-done, and a great resource. Not enough emphasis was placed on using it as the primary problem solving guide."

In general, survey respondents rated all five areas highly. The area with the most room for improvement is using the Vote Center Handbook to answer questions. As voters may come up with a wide range of questions that may go beyond the Vote Center Handbook's main purpose to train on voter processing and procedures to utilize voting equipment, a supplemental "Frequently Asked Questions" document may be helpful in the future to support Customer Service Representatives in answering common questions from the public that are unrelated to Vote Center operations such as how to check election results, file to run for office, etc.

Chart 9. Overall training experience



In evaluating their overall training experience, Customer Service Representatives generally agreed that the objectives of the training were clearly defined, the training was well organized, and that they felt well trained for Vote Centers. Of the three areas, the area with the most room for improvement was the organization of the training.

"Initially, I thought 3 days training was too long. Now that I've had 2 days training, I'm not sure I am prepared enough! So much to learn and keep in mind."

Many of the comments for this specific area indicate that the Customer Service Representatives would have liked more hands-on practice with equipment and roleplaying with various voter processing scenarios. The training schedule is being evaluated to see how it can be restructured to to be aligned with the contents of the Vote Center Handbook. With this adjustment, each day of the training schedule will mimic actual Vote Center operations beginning with set-up day tasks, going through daily voting processes, and concluding with election day procedures. This would subsequently increase the amount of time dedicated to hands-on practice and various role play scenarios.

DELIVERY SURVEY

Overview

The Registrar of Voters utilized the services of two delivery companies to transport supplies and equipment to Vote Centers prior to Election Day. The delivery drivers were notified that Vote Center hosts would be surveyed regarding the quality of the delivery service. Subsequent to the delivery of election supplies and equipment, Vote Center hosts were invited to participate in a brief survey, which consisted of the following questions:

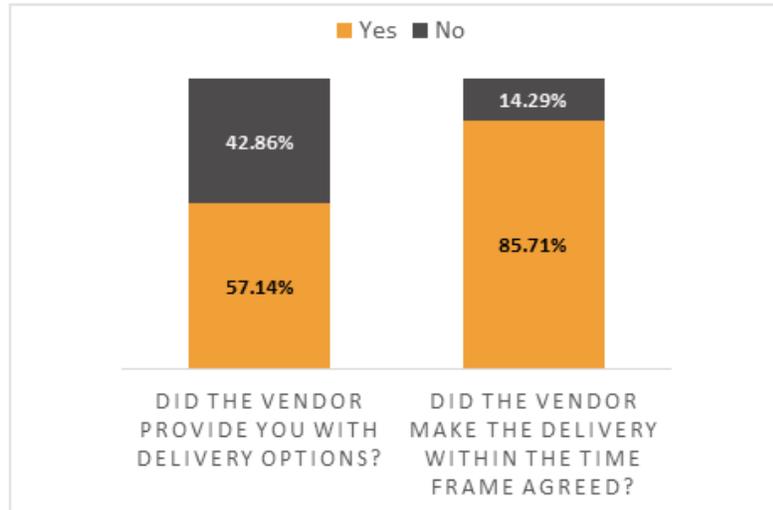
1. Did the vendor provide you with delivery options?
2. Did the vendor make the delivery within the time frame agreed?
3. Was the delivery vendor courteous?
4. Where there any issues with the delivery?
 - If issues, what were the issues?

Of the 189 Vote Center hosts who served in the March 3, 2020 Presidential Primary Election, 7 completed all or part of the survey for approximately 4% response rate. In the future, it may be worthwhile to consider delivering this survey electronically instead of by telephone. Each Vote Center host was given the option to skip any of the above listed questions within the survey. In order to provide flexibility and convenience for the Vote Center hosts, delivery vendors were expected to offer various options for delivery time and date.

As shown below, Vote Center hosts were also asked if the delivery of equipment occurred on time. Most Vote Center hosts replied that the delivery was timely. The Registrar of Voters will continuously strive to maintain a high level of timeliness for Vote Center hosts through the thorough analysis of survey data and selection of delivery vendors in future elections.

Equipment Delivery to Vote Center

Chart 10. Equipment delivery



Vote Centers were asked if the equipment had been delivered to their facility on the agreed-upon date and within the scheduled time frame.

Even when delivery options were not provided, 100% of respondents stated that the delivery was on time. Additionally, all respondents reported that the delivery vendor was courteous and that there was no issue with delivery.

The Registrar of Voters surveys Vote Center hosts on the quality of the delivery to Vote Center locations as it may influence the willingness of a Vote Center location would serve again in the future and how it can work with its delivery vendors to continuously improve their services.

"We are so impressed with the delivery. The driver was very courteous and very careful."

VOTE CENTER SURVEY

Overview

Following each election, Vote Centers hosts are surveyed to rate the hosts' experiences with various aspects of serving as a Vote Center.

Each Vote Center host was asked to answer a series of questions on the survey. The survey solicited feedback regarding the hosts' overall experience and motivation for serving in this election, the ease of receiving and storing the voting equipment, level of satisfaction with service provided by the delivery company and the Registrar of Voters office respectively, in addition to the following questions:

1. Please choose what best describes your facility.
2. Please rate the degree to which you agree or disagree with the following statements:
 - "I was adequately informed of the daily Vote Center operating hours."
 - "As a Vote Center facility, the process of scheduling and accepting delivery of the election equipment was easy and convenient."
 - "As a Vote Center facility, the process of arranging for the pick-up of election equipment was easy and convenient."
 - "While serving as a Vote Center facility, I felt supported by the Registrar of Voters office staff and knew who to reach out to with any questions that I may have had about hosting a Vote Center at our facility."
 - "All Registrar of Voters Customer Service Representatives assigned to work at our Vote Center, during the voting period, were courteous when interacting with our staff members and respectful of our facility."
3. Did members of the community visit your facility before or after the voting period for the purpose of voting? For example, if you were a 4-Day host, did members of the community visit your site during the 7 days before voting opened at your facility?
4. Overall, how would you rate your interaction with the Registrar of Voters Office?
5. Overall, how convenient was it for your facility to host a Vote Center?
6. Did your facility see an uptick in community use during the duration of the Vote Center period?

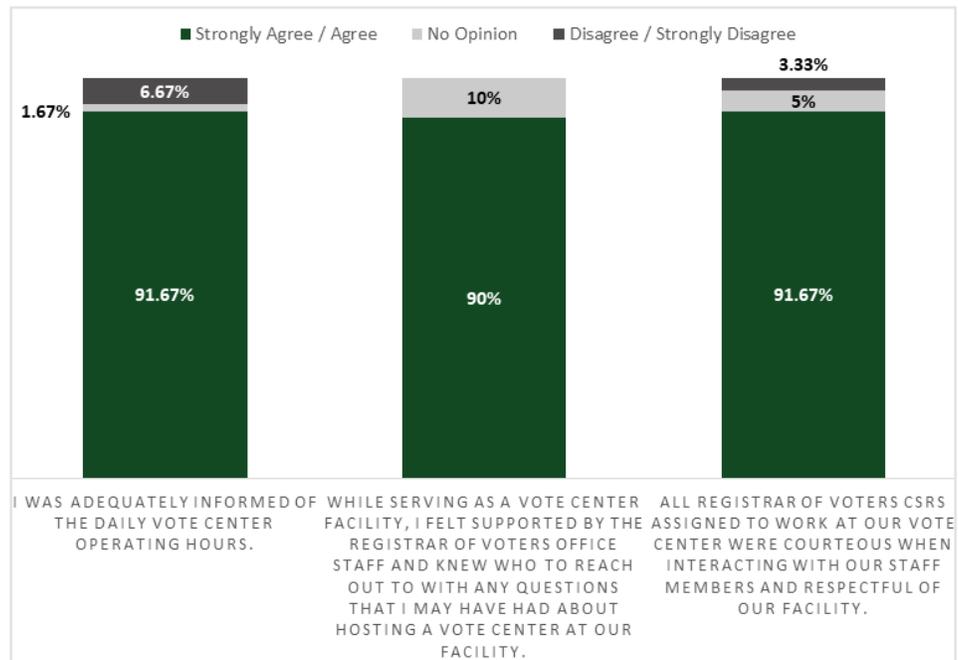
7. Are there any other rooms at your facility (or under your approval) that could serve as a Vote Center and/or provide additional space?
8. What information would have been helpful to have prior to being a Vote Center host?
9. What suggestions do you have to improve the Vote Center host experience?

Interaction with the Registrar of Voters

It is important that Vote Center hosts have good experiences in their interactions with staff from the Orange County Registrar of Voters and with Customer Service Representatives who worked at that specific Vote Center. Vote Center hosts rated their interaction with the Orange Registrar of Voters to be very high with 96.67% indicating their interaction being “excellent” or “good”.

To ensure that Vote Center hosts had good experiences, Vote Center hosts were asked to rate several statements regarding being informed of daily operating hours, whether they felt supported by the Orange County Registrar of Voters staff, and their interactions with the assigned Customer Service Representatives.

Chart 11. Ratings of following statements



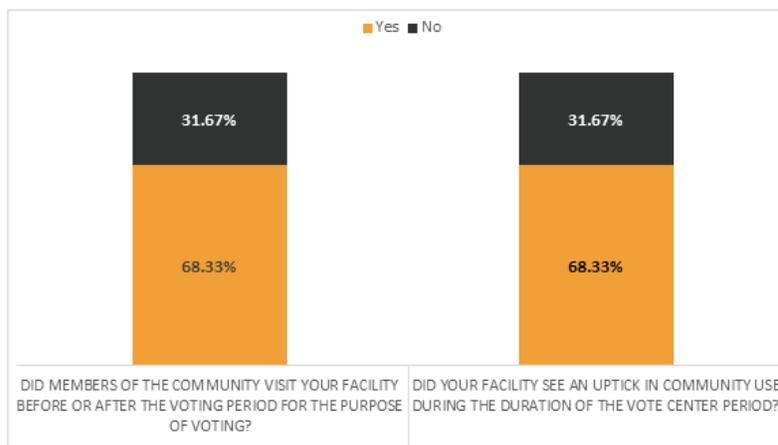
Overall, how would you rate your interaction with the Registrar of Voters Office?

| | |
|-------------------------|-------------|
| Excellent/Good | 58 (96.67%) |
| Fair | 1 (1.67%) |
| Poor/Improvement Needed | 1 (1.67%) |

Table 3. Overall interaction with ROV

Across the three areas, the most need for improvement would be relaying our Vote Center operating hours. In review of the comments, Vote Center hosts were surprised. Per Election Code, operating hours of a voting location are subject to ensuring every voter in line by the close of polls have the opportunity to cast their ballot. This proved to be particularly challenging on Election Day which was the busiest day for in-person day as 70% of in-person voters voted on this day. For future elections, Vote Center hosts should be made aware of the possibility that hours staff will be onsite to finish nightly closing procedures and pack up equipment and materials on the last day of voting may take longer than expected based on the flow of voters.

Chart 12. Facility visits before/after the elction



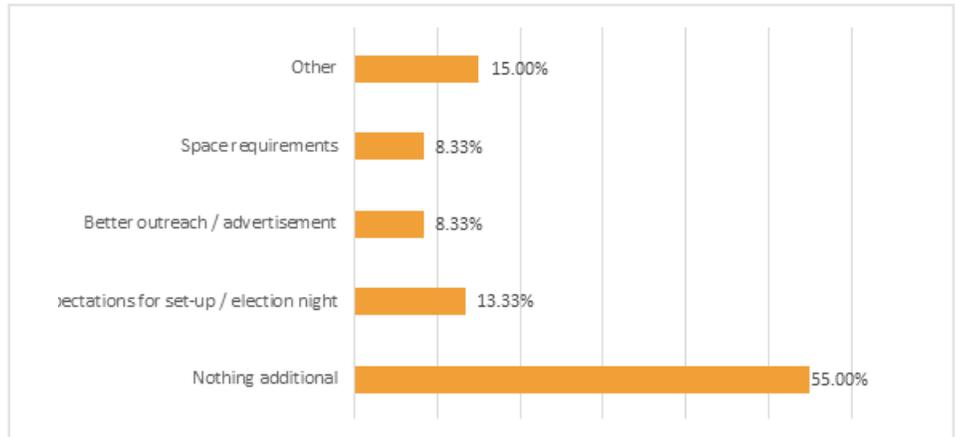
Most respondents indicated that their site was visited before the voting period for their Vote Center to drop off a ballot when their site did not have a ballot drop box. These sites expressed frustration with the lack of clear messaging on the website for which Vote Centers were open for eleven days and which were open for four days and which locations did not have a ballot drop box.

More Vote Center hosts indicated an uptick in community use, but this is not significant compared to the sites that did not see an uptick. For the hosts that saw increased community use, some indicated a positive impact with either inquiries for future facility use or increased engagement with the surrounding community. Otherwise, the increased community use was mostly on Election Day for the sole purpose of voting. For the Vote Center hosts that did not see an increase in community use, most hosts indicated that community use stayed the same because their facility already experiences regular community use. Some facilities also noted that there was a loss in community use because they had to cancel their regular programming in order to serve as a Vote Center.

“The staff that was at our facility were absolutely fantastic. They were highly respecting of our place, and interacted with our community members with kindness.”

“It would have been helpful to know that the set up of the equipment was going to take place immediately after the delivery, I would have suggested an earlier time given the size of the room.”

Chart 13. Helpful information prior to hosting in the future



While majority of Vote Center hosts indicated satisfaction with information provided prior to hosting a Vote Center, some hosts indicated that they needed more accurate information on expectations and time for set-up and how long the Vote Center could be in operation on the night of Election Day.

Overall Convenience

Figure 8: Overall convenience



As the Registrar of Voters office was the first and primary point of contact for Vote Center hosts, it was critical that the customer service provided had met the high standards set by the office. A goal of the Orange County Registrar of Voters was to make serving as a Vote Center host as convenient as possible. When asked about the overall convenience for a facility to host a Vote Center, 70% of respondents indicated either “very convenient” or “convenient”.

The lower score may be explained by that there is room for improvement in communicating hours of operation and hours needed for staff to complete required procedures. As Orange County had less planning time due to the Orange County Board of Supervisors providing approval in 2019 and the changing of the primary election from June to March, requests to potential Vote Center sites were delayed and many facilities often had their schedules booked up to a year in advance. Facilities reported struggles with having to cancel programming such as yoga classes and meetings. In the future, the Orange County Registrar of Voters will solicit Vote Center sites earlier to mitigate this type of situation.

PHONE BANK SURVEY

Overview

The Orange County Registrar of Voters hired and trained Customer Service Agents to provide continuous phone coverage for the public at large contacting the office for assistance prior to Election Day. In compliance with Section 203 of the Voting Rights Act, voter support through the Public Phone Bank was available in Spanish, Chinese, Korean, and Vietnamese, in addition to English.

At the conclusion of each call, the agents transferred callers to a telephone survey regarding the level of service provided. Survey results were monitored daily to immediately identify and rectify issues experienced by callers. Follow-up with callers who provided low survey scores was conducted within a period of 24 to 48 hours. Additionally, survey results were reported to and analyzed by the Election Operations Planning Team on a weekly basis to ensure the highest levels of customer service was provided to the public.

A total of 4,465 callers responded to the telephone survey regarding the service received when calling the phone bank, which asked callers to respond to the following statements:

1. Rate the overall quality of service of interaction with Customer Service Agent.
2. Rate how well the Customer Service Agent answered all my questions.
3. Rate the overall quality of service of Registrar of Voters.

Callers rated each statement using a five-point scale: 5 is excellent; 4 is very good; 3 is good; 2 is fair; and 1 is poor. The goal set by the Registrar of Voters was to achieve a score of 4.5 (or 90%) or higher. Overall, for each question, Customer Service Agents earned an overall average rating of 4.9.

Of the 31,093 calls made to the Phone Bank in the six weeks leading up to Election Day, 26,154 or 84% were serviced.

Public Phone Bank

Chart 14. Cumulative call volume

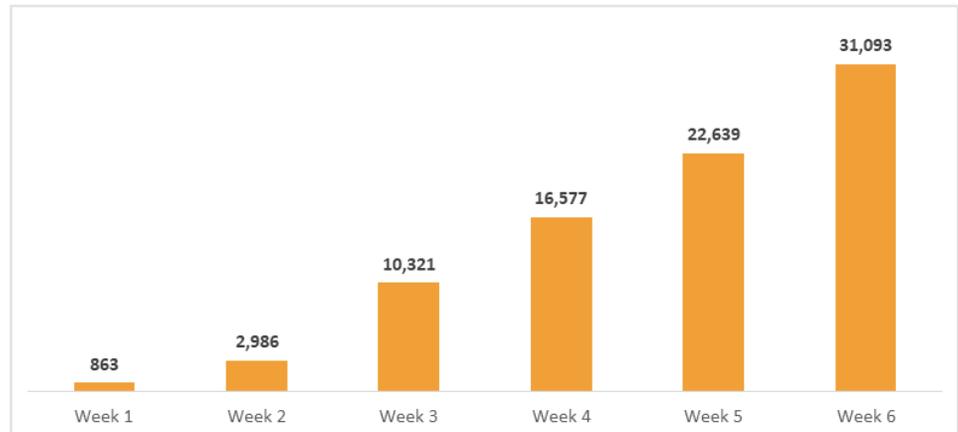


Table 4. Cumulative serviced calls

| Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 |
|--------|--------|--------|--------|--------|--------|
| 844 | 2,933 | 8,314 | 13,663 | 19,217 | 26,154 |

For the first question, callers were asked to rate the level of service provided by the Customer Service Agent they spoke with on a scale of one to five, with the score of five representing "excellent" and a score of one representing "poor". On average, respondents rated their Customer Service Agent with a score of 4.92 for Question 1.

Chart 15. Overall ratings



For Question 2, which asked to rate whether the Customer Service Agent answered all the callers' questions, respondents rated Customer Service Agents with a score of 4.95. Overall, the overwhelming percentage of those who reported receiving answers to their question(s) indicated that the level of competency demonstrated by the phone bank agents remained extremely high.

"A score of 4.95 indicates that the level of competency demonstrated by the phone bank agent remained extremely high."

Chart 16. Weekly survey ratings

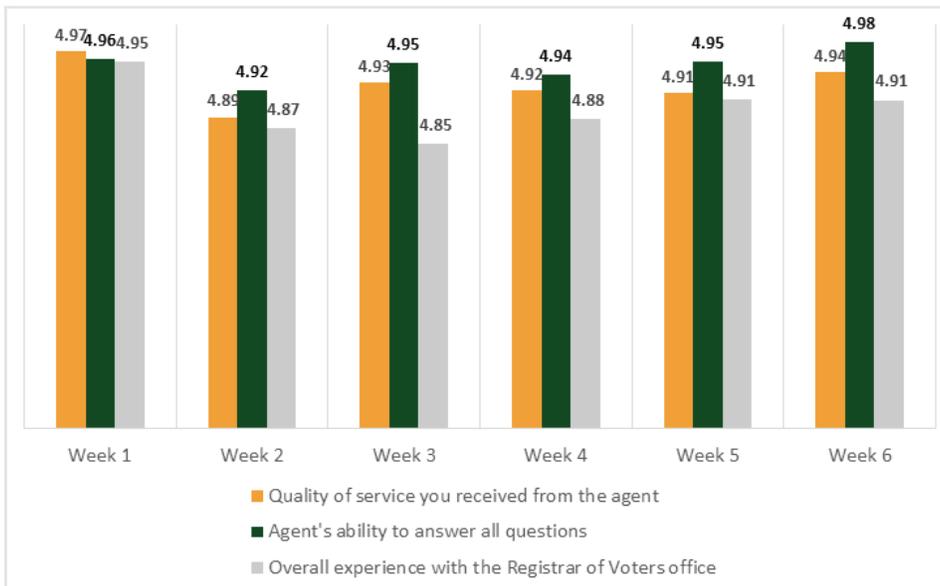


Table 5. Cumulative survey counts

| Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 |
|--------|--------|--------|--------|--------|--------|
| 421 | 1,138 | 2,403 | 3,326 | 4,090 | 4,465 |

The final question asked the Public Phone Bank callers to rate the overall quality of service provided by the Registrar of Voters, used the scale of one to five employed in the previous question. The average score to the final question is 4.89, which reflects the high quality of service translating into a very positive overall experience for callers.

Follow-up calls were conducted for callers who indicated a score of 3 or lower. In our follow-up, we discovered that a majority of callers (90%) misunderstood the survey instructions and selected 1 believing that it was the highest score, as opposed to the lowest.

"The average score to the final question is 4.89, which reflects the high quality of service translating into a very positive overall experience for callers."

SUPERVISOR SURVEY

Overview

Vote Center Supervisors play a vital role in Vote Center communications, general troubleshooting and Vote Center supply replenishment. Supervisors are assigned six to seven Vote Centers where they provide continual backup support and monitoring of statutory compliance and procedures.

Supervisors were charged with keeping the Department apprised of the status of their assignments from 5:30 a.m. through the close of polls on Election Night. They were responsible for alerting the office of any major issues that may arise from Vote Center set-up, operations, and closing, as well as assisting Customer Service Representatives in resolving problems. All Supervisors were provided a survey with the following questions:

1. Rate the following statements:
 - “The 3-day CSR training adequately prepared CSRs to understand the responsibilities of the CSR role.”
 - “The 3-day training class equipped CSRs with the necessary tools and knowledge to adequately and efficiently process voters with use of the ePollbook.”
 - “The 3-day training class equipped CSRs with necessary tools and knowledge to adequately and independently complete the daily opening and closing procedures at their respective Vote Center.”
 - “The Supervisor specific training prepared me to complete my specific job responsibilities.”
 - “The equipment and supplies provided were beneficial to Supervisors.”
 - “I felt supported by the internal Registrar of Voters staff while out in the field.”
2. What wasn’t covered in training but could be beneficial for Supervisors in the field?
3. What method did you prefer to receive important updates from the Registrar of Voters?
4. What problem(s) did you experience at a Vote Center that you were not prepared to resolve?
5. Would you consider working as a Supervisor for the Registrar of Voters in the future?

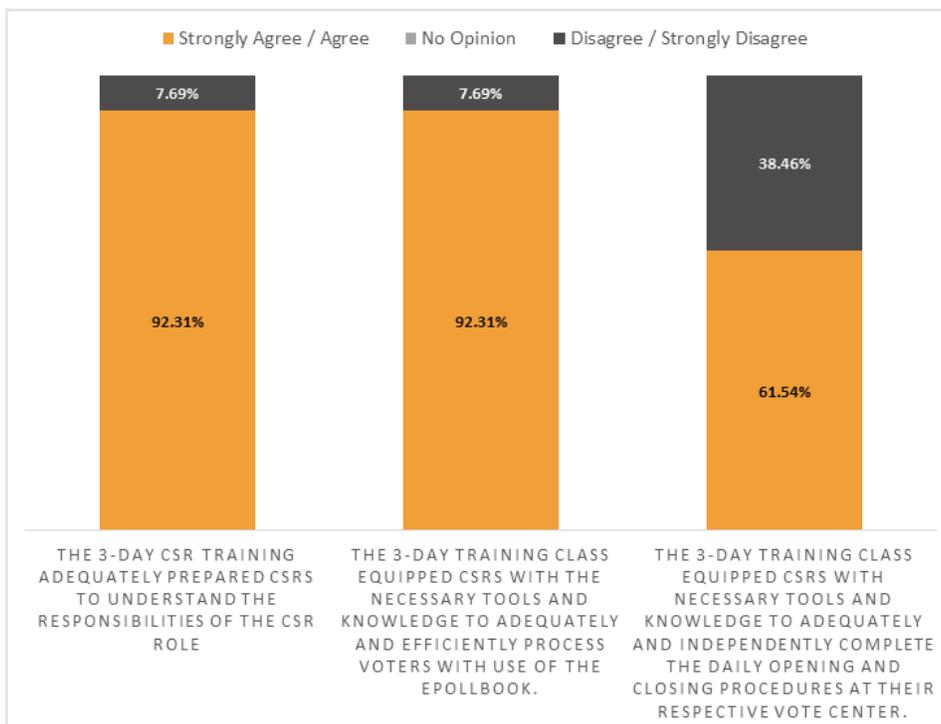
- 6. Do you have any other feedback that can help Supervisors be successful in their role?

The feedback received from these Supervisors was extremely valuable to Registrar of Voters, because they had a critical role in ensuring Vote Centers were a success.

Overall Experience: Communication, Training and Preparation

Supervisors were provided the opportunity to rate the Registrar of Voters on the level of training and preparation they received prior to being deployed in the field. Respondents were given the rating options of strongly agree, agree, no opinion, disagree, or strongly disagree. The Department placed a high priority on preparing and training Customer Service Representatives, which Supervisors also completed the same 3-day training as the Customer Service Representatives and received additional training specific to Supervisors. Consequently, survey comments and assessments from staff will be analyzed to better understand what can be done to better support Supervisors and provide them a better experience in the future.

Chart 17. Supervisors' views on CSR training



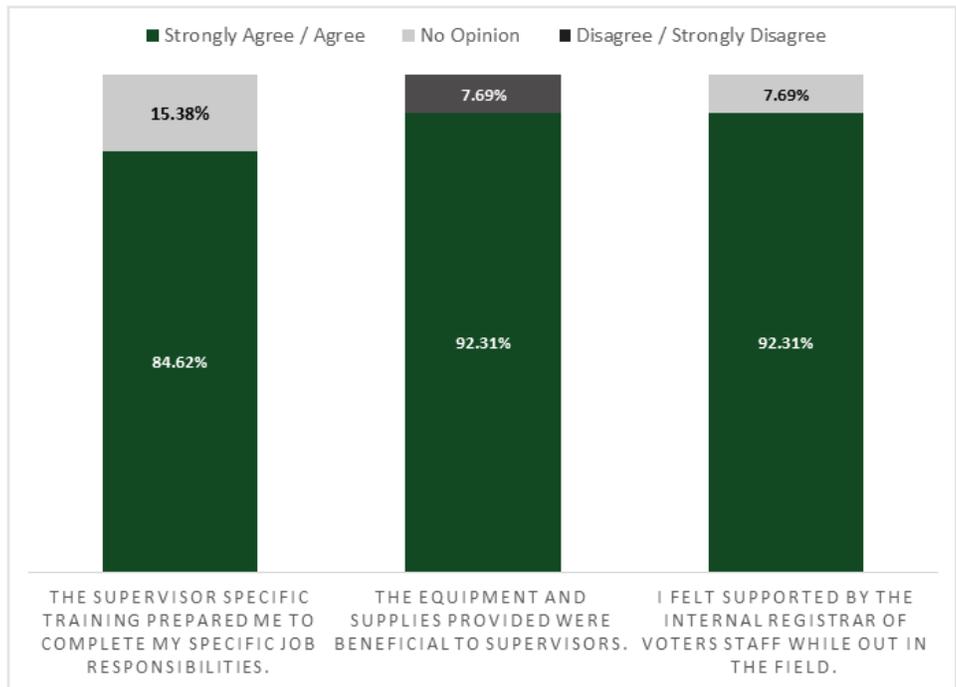
"I was blessed with GREAT teams of CSRs who were willing and ABLE to work together to get it all done timely (in most instances) I encouraged, directed when necessary daily based on the training as a facilitator and knowing what needed to be done and the resources provided by the ROV"

I believe the CSRs understood the responsibilities of the importance of their job and the main objective of protecting the rights of the voters and providing a positive voting experience."

As Supervisors were whom Customer Service Representatives would contact first for many matters, Supervisors are well positioned to speak whether the 3-day training prepared the Customer Service Representatives to work in a Vote Center. Supervisors were asked to respond whether the 3-day training prepared the Customer Service Representatives to understand their responsibilities, how to adequately and efficiently process voters with the use of the ePollbook, and how to adequately and independently complete the daily opening and closing procedures at their Vote Center.

Supervisors rated that the 3-day training adequately prepared Customer Service Representatives to understand their role and to adequately and efficiently process voters with the ePollbook highly (92.31% for both areas). Of the three areas, Supervisors gave the lowest scores to whether the 3-day training prepared Customer Service Representatives to adequately and independently complete the daily opening and closing procedures. The daily opening and closing procedures are highly complex and technical as it may require multiple steps and written documentation for tracking ballots and equipment. Opportunities for improvement include spending more time on this particular piece during training and putting examples in the Vote Center Handbook and CSR Portal for Customer Service Representatives to reference before and during the voting period.

Chart 18. Supervisor training & support received



To prepare for their role, Supervisors went through enhanced training, were provided additional equipment and supplies, and had several direct contacts in the Orange County Registrar of Voters to support their field operations. The survey asked Supervisors to rate these preparations and results indicate that Supervisors overall felt the equipment and supplies were beneficial (92.31%) and felt supported by staff while out in the field (92.31%). Of the three areas, the area with the most room for improvement is the enhanced training with a score of 84.62%. Interestingly, the decreased score is not due to any “disagree” or “strongly disagree” ratings but rather “no opinion” ratings instead.

Supervisors would come to the Orange County Registrar of Voters’ office early in the morning prior to the opening of Vote Centers for a quick debrief, replenish supplies before heading out into the field and would not come back to the office until much later in the evening. As a result, it was critical to determine what was the best way to transmit information and maintain communication.

Survey results indicate the Supervisors had a slight preference for email communication (38%) but also strongly preferred morning debriefs (31%) and text communication (31%) as well. No Supervisors indicated that they preferred written updates.

This is particularly helpful to incorporate in future elections as there may be last minute changes and communications that need to be relayed to Supervisors immediately so the information can be transferred to Customer Service Representatives at Vote Centers.

“Though this was a first time experience with new equipment and new procedure, I think the ROV was very well prepared and organized in conducting it. This was a successful dress rehearsal for November 2020.”

Figure 9: Supervisor - preferred contact method

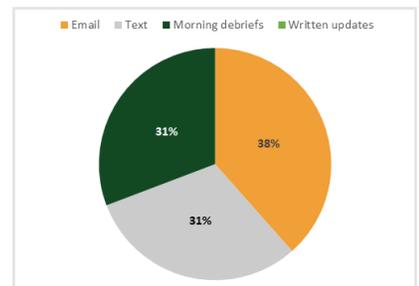
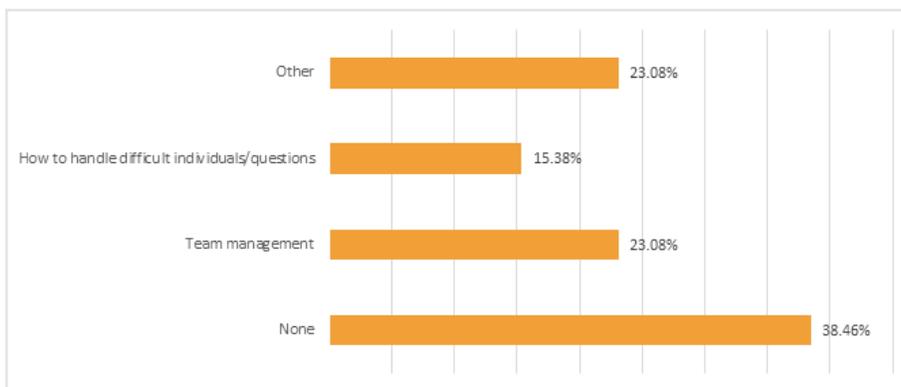
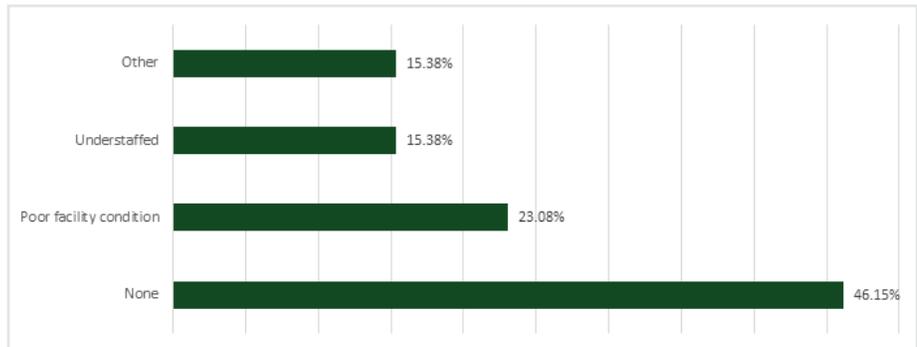


Chart 19. Helpful training topics for future



While most Supervisors were satisfied with the amount of training received, other Supervisors indicated that they would like to have received training on team management and how to handle difficult situations. As the one of the primary responsibilities for Supervisors is to handle, these will be areas that can be incorporated into future training so Supervisors are better equipped to handle these types of issues.

Chart 20. Problems unprepared to solve



On problems Supervisors felt unprepared to solve, most Supervisors indicated that they did not encounter any problems that could not be resolved; other Supervisors indicated frustrations that their Vote Center sites were understaffed, and the facility was in poor condition to serve as a Vote Center. With staffing being a finite resource, the Orange County Registrar of Voters is exploring how to distribute the flow of voters to be more even across the voting period instead of the majority of voters showing up to vote in person on Election Day. Voter Center sites will also be evaluated to determine which performed well as a Vote Center and which sites should be replaced by another site for future elections.

All survey respondents indicated they would be willing to consider working as a Supervisor again in future elections, which is a reflection on the positive experience they had in the March 3, 2020 Presidential Primary Election. Experienced Supervisors will improve the experience of Customer Service Representatives and voters alike and retention of high-performing Supervisors is a goal of the Orange County Registrar of Voters.

“100% of Supervisors would consider working as a Supervisor in future elections.”

FACILITATOR SURVEY

Overview

Facilitators play a vital role in Vote Center operations as they are responsible for the training of all 1,000+ Customer Service Representatives in approximately five weeks. Facilitators received intensive training, equipment, and materials to prepare for success and had direct contacts at the Registrar of Voters' office in case they needed assistance in the field.

All Facilitators were provided a survey with the following questions:

1. Rate the quality of your training to serve as a Facilitator.
2. What was covered well in Facilitator training?
 - What topic(s)/area(s) could be improved in Facilitator training?
 - What wasn't covered but would have been beneficial to be trained on before being deployed in the field?
3. Was the equipment provided to Facilitators enough? (ePollbook, cell phone, projector)
 - If not, what other equipment would have been helpful to have been assigned to each Facilitator?
4. Rate the following statement: "The 3-day training was sufficient for CSRs to learn the materials and their responsibilities."
 - If not, how much time is needed and/or what should be changed?
5. In your experience, what did CSRs have the most difficult time grasping during training?
6. What would be the ideal class size for CSR training?
7. Rate the following statement: "I felt supported by the internal Training team while I was out in the field."
 - If not, what could have been improved?
8. What did you enjoy most about working as a Facilitator?
9. What did you enjoy least about working as a Facilitator?
10. Rate the following statement: "I would consider working as a Facilitator for the Registrar of Voters again in the future."

The feedback received from these Facilitators was extremely valuable to Registrar of Voters, because they had a critical role in ensuring Vote Centers were a success by leading presentations and hands-on practice exercises for every Customer Service Representative to learn Vote Center processes and procedures.

Overall Experience: Communication, Training and Preparation

Facilitators were provided the opportunity to rate the Registrar of Voters on the level of training and preparation they received prior to leading training classes in the field. Respondents were given the rating options of excellent, good, fair, improvement needed, or poor. Consequently, survey comments and assessments from Facilitators will be analyzed to raise the ratings of excellent and good while keeping ratings of improvement needed or poor to a minimum.

Figure 10: Facilitator satisfaction of training received



Facilitators received approximately three weeks of training, which covered voter processing, voting equipment, and procedures for handling ballots. The “Train the Facilitator” training was led by the internal Training Team and provided opportunities for the Facilitators to better understand and master topics prior to leading the training for Customer Service Representatives. Survey respondents indicated that the quality of the training was high as 80% of respondents reported it being “excellent” or “good”.

Since Facilitators lead multiple training classes throughout the weeks leading up to the voting period, their perspective is critical on assessing whether the training is sufficient for Customer Service Representatives to learn the materials and their responsibilities is highly valuable. Overall, survey responses show that training was sufficient. These responses will be cross-referenced with responses from the Customer Service Representative Survey to determine if there is consensus on whether the training was sufficient.

Chart 21. Facilitators’ view on CSR difficulty grasping concepts

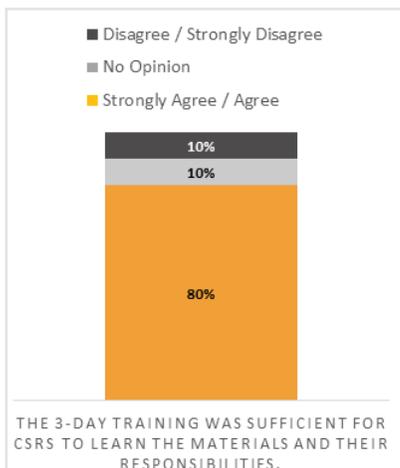
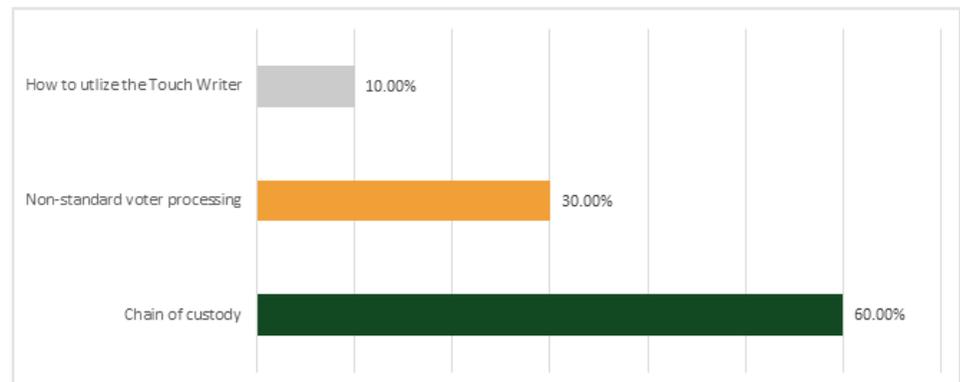


Figure 11: Facilitator’s view on the CSR training length

On what Customer Service Representatives had the most difficulty with, 60% of Facilitators responded with chain of custody procedures and paperwork. This was also the top response for what topics could be improved for training Facilitators as well. Facilitator training and Customer Service Representative training materials will be reviewed to look for ways to streamline the concept of chain of custody and more opportunities to practice completing the procedures and paperwork.

Due to fluctuations in recruitment patterns, training class sizes would vary from training to training. An observable pattern appeared that training classes that occurred earlier on would have fewer Customer Service Representatives in attendance whereas later training classes would be at maximum capacity due to the increase in recruitment volume. A regular training would have the capacity for 40 and an emergency training class would have the capacity for 50. Facilitators were asked to provide feedback on what would be the ideal class size to successfully train Customer Service Representatives and the most popular response was from 20-30 (5), which was closely followed by 10-20 (4).

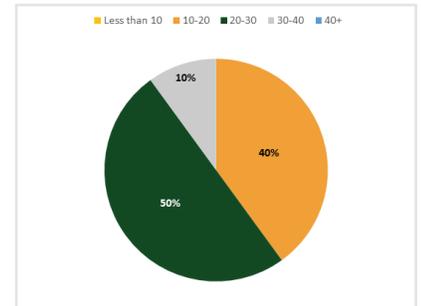


Figure 12: Ideal CSR class size

Figure 13: Satisfaction of the number of equipment provided



Every Facilitator received a set of equipment to support leading training classes while out in the field. Their set included a projector, soundbar, a MiFi device, an ePollbook with mobile case, a mobile printer, and an iPhone. Facilitators were asked to respond whether the provided equipment was sufficient for them to carry out their responsibilities. Based on their responses, 80% reported “yes” and 20% reported “somewhat”; there were no responses that indicated that the equipment was not enough. For future elections, the set of equipment may include a laptop as it was a logistical challenge to ensure laptops were transferred from one training site to another training site.

Figure 14: Satisfaction of the support by the internal training team



With training classes taking place nearly every day of the week throughout Orange County, it was critical to have a strong support system inside the Orange County Registrar of Voters’ office for Facilitators to be able to contact and assist with any questions or issues

“Helping the CSRs understand the process & the moment when they knew that they CAN do it! The teamwork between the facilitators & learning from each other. Even the hours! It was hard work, but I felt fulfilled every day!!!”

“100% of respondents would consider working as a Facilitator in future elections.”

that may arise in the field. Whether the issue was related to personnel, malfunctioning equipment, or missing materials, the internal Training Team was available to support and be deployed when necessary to provide equipment and materials to Facilitators at the training site. When asked to rate whether the Facilitators felt supported by the internal Training Team while out in the field, 90% of respondents reported they either “strongly agree” or “agree” with that statement.

At the end of the survey, Facilitators were asked to rate their willingness to work as a Facilitator for the Orange County Registrar of Voters again in a future election. All survey respondents reported they would be “very likely” or “likely” to do so, which is encouraging as retaining experienced and knowledgeable Facilitators is a priority.

CANDIDATE FILING SURVEY

Overview

First introduced in June 2012 Election, the Candidate Filing Survey was developed to assess the service provided by the Registrar of Voters office to candidates filing for office. Candidates can complete the entire process in person at the Registrar of Voters office, or alternatively they can begin the filing process online and complete the final steps in person at the Registrar of Voters. Prior to the conclusion of the candidate filing process, each candidate received a survey to obtain feedback regarding the candidate filing process, both in person and online with questions as follow:

In-Person Candidate Filing Survey Questions:

- The process was organized and efficient.
- Staff was knowledgeable in explaining the Candidate Filing problems.
- Staff was courteous and professional.
- I was given adequate information to complete each step in the process.
- Waiting time was efficiently managed.

Online Candidate Filing Survey Questions:

- The process was organized and efficient.
- Staff responded to my emails in a reasonable time.
- Staff was knowledgeable and courteous.
- I was given adequate information to complete each step in the process.

The Registrar of Voters office strives to provide an outstanding level of customer service to all candidates running for office, whether they are running for a high-profile office such as U.S. Representative, or a local office such as Member of the Orange County Board of Education. With numerous contests on the ballot, the Registrar of Voters assisted many candidates in navigating the filing process, with the goal of making the process easier to understand and less time consuming for candidates. In order to evaluate the level of service provided, the Candidate Filing Survey solicited input regarding the efficiency of the process, professionalism of staff, and overall quality of service provided by the Registrar of Voters.

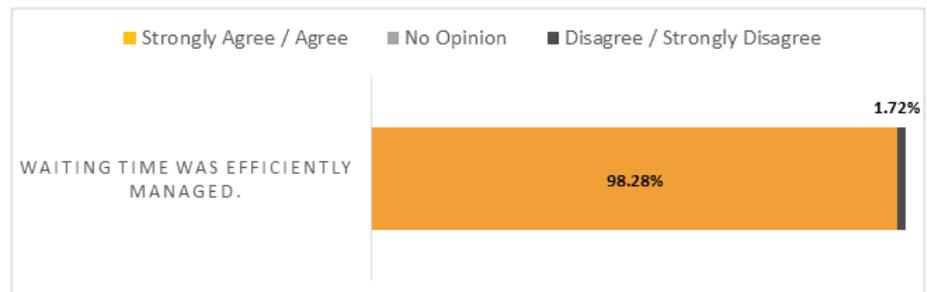
In the March 3, 2020 Presidential Primary Election, the Registrar of Voters office received 167 surveys; 116 candidates opted for the in-person survey and 51 candidates completed the online survey.

In-Person Candidate Filing – Wait Time

In order to ascertain the overall level of satisfaction experienced by candidates in the candidate filing process, the survey inquired about organization and efficiency of the process, staff knowledge, staff courteousness and professionalism, the level of information provided, and wait time. The Registrar of Voters office received 116 in-person surveys.

As shown below, ratings given by candidates in response to these questions were high, as survey results showed candidates rated over 98% for strongly agree or agree as responses for all questions.

Chart 22. In-person wait time



Online Candidate Filing - Response Time

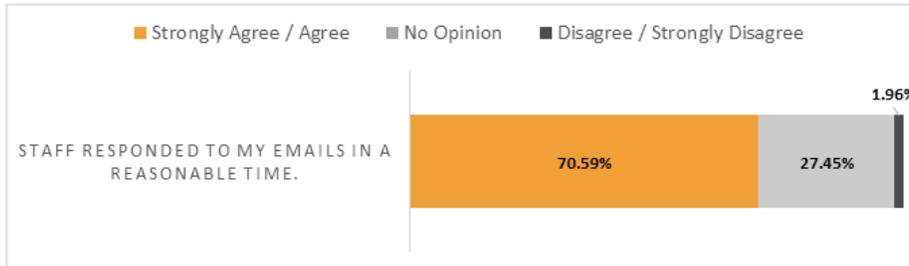
In addition to collecting in-person candidate filing surveys, the Registrar of Voters collects surveys from candidates who choose to complete their candidate filing online. The Registrar of Voters received 51 online surveys.

Most candidates rated their experience highly positive with the online candidate filing process for all questions regarding the organization and efficiency of the process, timely responses, staff knowledge and courteousness, and being provided adequate information. Although only one respondent reported either disagreeing or strongly disagreeing that staff responded to emails in a reasonable time, there is an opportunity for improvement in understanding why a significant portion of respondents reported having “no opinion” so we can improve our service to candidates that choose to file online in future elections. It could also mean that the online candidate filing process is straight forward and the

"I have been working with the ROV for 30 years and it gets better and better each year under your leadership."

candidates that file online do not have any questions regarding the process.

Chart 23. Online email response time



In-Person and Online Candidate Filing – Overall Quality

When taking all aspects of the candidate filing process in consideration, the Registrar of Voters provides opportunities for respondents to provide ratings on whether the process was organized and efficient, whether staff was courteous and knowledgeable/professional, and whether candidates were given adequate information to complete each step in the process.

Survey results showed that candidates were very satisfied overall with the quality of the candidate filing process as nearly every respondent indicated with an “agree” or “strongly agree” response. The high ratings reflect the intentional focus and preparation of staff for candidates to have a positive experience with the Registrar of Voters.

"This was my first time going through this process and your staff made it very pleasant. They were extremely helpful and knowledgeable. Everyone was ready and willing to help."

Table 6. Online & in-person filing quality

| | The process was organized and efficient. | Staff was courteous and knowledgeable / professional. | I was given adequate information to complete each step in the process. |
|----------------------------|--|---|--|
| Strongly Agree/Agree | 166 | 167 | 167 |
| No opinion | 1 | 0 | 0 |
| Disagree/Strongly Disagree | 0 | 0 | 0 |

In-Person and Online Candidate Filing – Overall ROV Service

A candidate may have worked with multiple staff members during the candidate filing process with the Registrar of Voters. It is a priority to provide excellent customer service regardless of whether the candidate filed online or in-person at the Registrar of Voters' office in Santa Ana.

Results from this portion of the survey from both candidates who filed online and in-person indicate a very high level of satisfaction in the overall service provided by Registrar of Voters staff. Though the survey scores show every respondent indicating they considered the service provided to be "very good" or "excellent," the Registrar of Voters will continue to look at opportunities on how service can be improved even further upon in future elections.

"100% of respondents indicated the service provided was satisfactory."

CONCLUSION

Since the transition to the new voting system brought much change, the Orange County Registrar of Voters is committed to developing new surveys to track the implementation of procedures, training, and quality of service to better understand how to continue improving our processes and services.

Survey results from the March 3, 2020 Presidential Primary Election were positive in all eight areas measured, with feedback being received from a wide range of participants, including, but not limited to, Customer Service Representatives, Supervisors, Facilitators, and Vote Center hosts.

Areas that showed positive ratings or gain in ratings were:

- High scores for Customer Service Representatives' overall experience being "excellent" and the likelihood that they will serve in future elections
- High scores for Supervisors and Facilitators' satisfaction with training and being prepared to support Customer Service Representatives
- Consistently high level of customer service provided by the Registrar of Voters staff across the board
- Retention of Supervisors and Facilitators working with the Registrar of Voters and Vote Center hosts willing to serve in future elections

Responses that require additional attention from the Department are:

- Ongoing innovation that continues to improve the training for Customer Service Representatives, so they feel well prepared to process voters at Vote Centers
- Ongoing innovation that continues to improve the overall experience of Candidates, Facilitators, Supervisors, and Vote Center Hosts
- Ongoing monitoring of contracted delivery vendors' level of timeliness when providing equipment delivery service

The Orange County Registrar of Voters will continue to work and to improve its services on all levels and will address issues that have surfaced through survey results in preparation for the November 3, 2020 Presidential General Election.