

Field Guides
To Ensuring Voter Intent

Vol. 03

Testing ballots for usability

Field-researched, critical election
design techniques to help ensure that
every vote is cast as voters intend

The Field Guides
are online at
civicdesign.org/fieldguides

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Testing ballots for usability

Fourth edition, 2018

About the Field Guide series

If you could do just a few things that would make a big difference in the experiences voters and poll workers (and even candidates) have, what would those be? That's the question we tried to answer in each of the *Field Guides To Ensuring Voter Intent*.

Every guideline and example is based in research and practice. The guidelines come from sources ranging from the Election Assistance Commission, to the National Institute of Standards and Technology, to lots of our own research conducted alongside county and state election officials. We've tried to make each one easy to follow. You should be able to implement most of the guidelines independent of election laws or voting system technology.

— Dana Chisnell, *Field Guides Editor*

About this Field Guide

The top 10 guidelines for conducting usability tests of ballots come from two main sources. The first is a group of documents put together into the LEO Usability Testing Kit developed by the Usability and Voting Project of the Usability Professionals' Association. (LEO stands for local election official.)

The second source is the years of experience the team behind the Field Guides has conducting usability tests and working with counties and states to help them make ballots, forms, and web sites work better for all citizens. For more about this topic, go to civicdesign.org.

What is usability testing?

Usability testing is a tool for learning where people interacting with a design – such as a ballot – encounter frustration, and translating what you see and hear to make a better design that will eliminate those frustrations.

At its essence, usability testing is a simple technique: Watch and listen to people who are like your voters as they use a design as they normally would (or as close to normal as you can get). You can probably already see how this is different from conducting surveys or focus groups.

Why should you test?

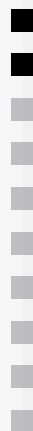
When it is easy for voters to use a ballot, they are more likely to vote as they intend. That means fewer lost votes, which means wider margins (generally), which means fewer ballots are contested if there is a recount. All of which adds up to better elections for everyone.

**No. 01**

Testing helps ensure that voters can vote the way they intend.

What do you need?

It's really simple. You don't need recording equipment, but you might want to take notes. So, a clipboard can be handy. And you probably want an envelope or a folder to hold the ballots (or other materials) from the test sessions.

**No. 02**

Put together a ballot, pick an interviewer, find voters, and find a place to watch them use the ballot.

When should you test?

Test ballots to improve the ballot design and to understand training issues for election workers when:

- you have a good idea what will be on the ballot for the next election
- something major has changed, such as new legislation
- something happens that may cause the overall layout to change, such as removing a candidate or a question

No. 03

Test when you know what is going to be on the ballot or when something has changed.

Know why you are conducting a usability test.

Usability tests can answer questions like these:

- How easily and successfully do voters mark the ballot?
- What mistakes do voters make in marking the ballot?
- How close is the marked ballot to how they said they intended to vote?

No. 04

Usability testing answers questions about how and why voters will use the ballot.

Who is needed to run a test?

Who	How many
<i>Voters</i>	12 to 15 one at a time
<i>Interviewer</i>	1 you or someone who didn't design the ballot
<i>Helper / note taker</i>	1 or 2 someone who can help you review
<i>Observers</i>	1 or 2 from citizen groups (you can turn them into helpers, too)

No. 05

Start testing early with a few voters trying out the first versions of the ballot, one at a time.

What do you test?

When you do your first usability test, you might want to practice on somebody else's ballot. That way, you won't feel so bad when you test yours.

Otherwise, you can test:

- mock-ups or early versions
- ballots from the last election
- a nearly-final ballot

No. 06

Test with what you have available. Test again when you have the final version.

Where should you test?

Choose a place where you can find voters:

- library branches
- farmers' markets
- street fairs
- parks and plazas
- village offices, town halls, city hall, county buildings
- kitchen tables, food courts, pancake breakfasts, fish fries

No. 07

Voters for your usability tests are everywhere. Go to them.

What happens in a usability test?

- 1 Introduce the session.
 - Go over what will happen.
 - Give instructions.
 - Give the voter the ballot.
- 2 Watch the voter vote.
- 3 Listen for questions (don't answer them) and comments (write them down).
- 4 When they are done voting, ask the voter to walk you through what they did and why.
- 5 Thank the voter profusely.

No. 08

Follow these steps to run each session of a usability test.

What is the role of the interviewer?

As the interviewer, you guide the voter through the session, watch what the voter does, and take notes (if you can).

Do not help the voter use the ballot. (Well, until after you have finished learning what you need to learn.)

Ask open-ended questions, like, "How did that go?" Follow up with a statement like, "Tell me about how you marked the ballot."

No. 09

**Watch and listen.
Don't teach.
Don't help.**

What should you look for?

Did the voters:

- Ask for help with instructions or using the ballot?
- Ask questions? (If so, what questions.)
- Make comments? (Again, note what they say.)
- Take out reading glasses or lean way in?
- Mark the ballot incorrectly?
- Have trouble moving through the ballot?
- Seem confused, puzzled, or frustrated?

No. 10

Watch for mistakes, listen to questions, look for hesitations.

What do you do with what you find out?

Look at what parts of the ballot caused questions, comments, mistakes, or requests for help.

This should tell you what is confusing to voters, what is unclear to voters, and why. It should also tell you what might need instructions or a different heading or label.

Bonus!

Review what you saw and heard. Tally the types of problems voters had.

Tip**Planning for usability tests**

- Pick a location
- Find a helper / note taker
- Decide what to test for
- Create the ballots to test
- Make a script for the session
- Rehearse with the note taker
- Go run the test sessions!

Who made this Guide possible?

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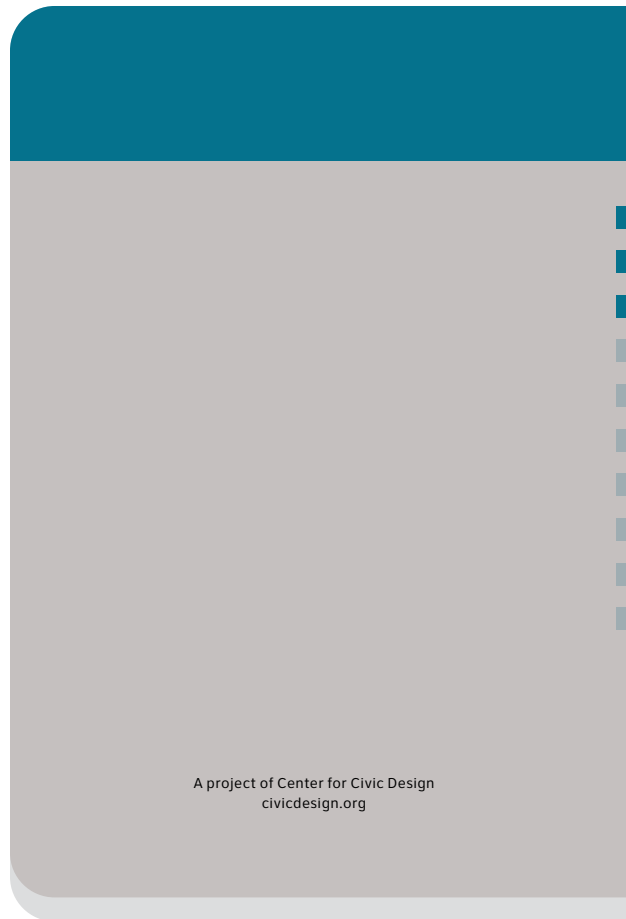
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