5 Key Takeaways from the 2020 Election Cycle

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BECAUSE EVERY BALLOT COUNTS

Significant Increase in Vote by Mail Participation

The 2020 election cycle, taking place during the COVID-19 pandemic and amid universal calls for transparency and security, brought an unprecedented challenge to state voting processes.
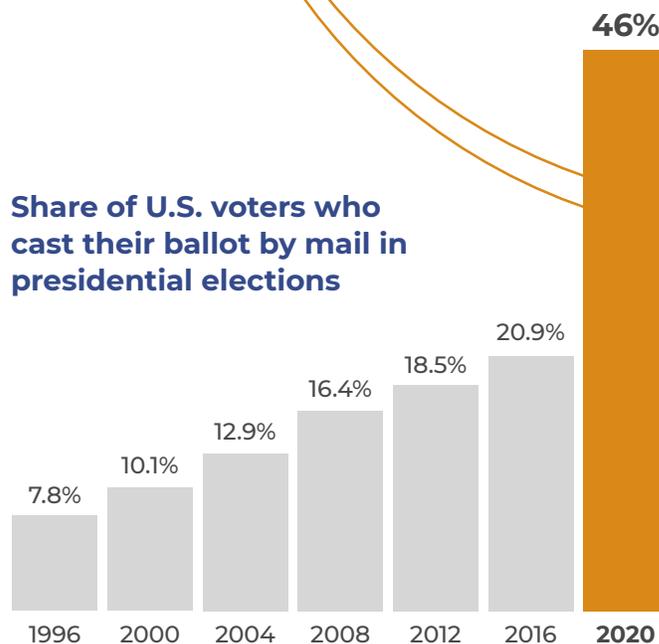
In particular, vote by mail (VBM) opportunities widened across the country, triggering extremely tight ballot production and mailing timelines in nearly every state.

Just consider: 46 percent of voters used VBM in the 2020 presidential election — more than double the number of those who voted by mail in 2016.

The 2020 election cycle set the stage for a massive change in voting. Rather than voters going out of their way to request ballots because they expected to be away during the elections, pandemic-related concerns made requests for VBM skyrocket. Compounding the increase in VBM requests was the additional concern about the accuracy and security of the election process and conformance with regulations set forth by each state.

Some states and counties did a better job than others of responding to the evolving situation and introducing or augmenting VBM options — which, in some cases, helped increase voters' familiarity and trust in the methodology. It also delivered an unexpected opportunity to adapt, learn and prepare for elections going forward.

Share of U.S. voters who cast their ballot by mail in presidential elections

Year	Percentage
1996	7.8%
2000	10.1%
2004	12.9%
2008	16.4%
2012	18.5%
2016	20.9%
2020	**46%**

US Census Bureau / Pew Research Center

5 KEY TAKEAWAYS

Understanding what contributed to a successfully executed election can benefit every municipality. To that end, we offer five essential takeaways from our experience handling VBM in the 2020 election cycle, including considerations for the future.

1 DATA HANDLING WILL MAKE OR BREAK VBM

The VBM process begins with a list of names. Depending on the state, this list may be all registered voters or all registered voters who have requested a ballot through the state's approved process. The quality of this data is imperative to the success of the VBM effort.

Election officials are often plagued by inconsistent data formats, usually due to differences in data entry points — such as data collection by phone, through an online form or through other voter registration methods. This can yield a database with a fluctuating format that results in a lower United States Postal Service (USPS) Coding Accuracy Support System (CASS) standardization rate when the data is prepared for processing.

A consistent format is critical, because CASS standardization makes it possible for ballots to be processed with USPS Intelligent Mail barcodes (IMbs). These barcodes ensure accuracy and allow ballot packets to be tracked from the point of acquisition by the USPS to the point of delivery to the voter.

If a packet is mailed without an IMb, it is untrackable. This results in a loss of accountability and reliability.

When you consider, according to the Pew Research Center, that about 40 percent of VBM voters in the 2020 general election were using the method for the first time that chain of custody from election officials to printer to postal service to voter needed to be solid and trackable to ensure the validity of the ballots available to be cast.

Working with a partner who has created data tools that help prepare voter databases for CASS standardization results in a higher percentage of IMb-coded ballot packets heading out to voters.

Ideally, every address will pass CASS standardization on the first try. Records that fail should be put through a planned correction process to facilitate a speedy update and reprocessing time.

2 | VBM SUCCESS IS DRIVEN BY THE BALLOT AND ENVELOPE FORMAT

The format of a ballot and envelope packet determines the intelligence capabilities of the overall effort. The design of ballots and envelopes should be a top priority. Formatting all pieces of the packet to, first, correctly associate with the proper voter and, second, to run efficiently on both the state-of-the-art intelligent inserters used in VBM production efforts and the specific ballot scanners used in each election delivers the greatest potential for success.

Cutting-edge inserting equipment not only matches and assembles the ballot and envelope packets, but also provides valuable data insight as it captures records passing through each step of the production process.

As a result election officials have access to real-time reporting, ensuring schedules and accuracy are maintained throughout the manufacturing process.
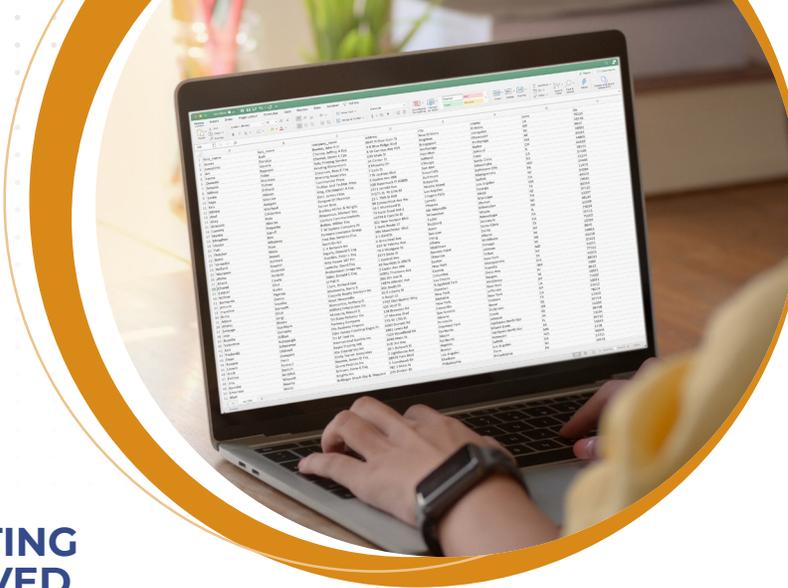
This combination of streamlined production and variable data printing also make it possible to assign both outbound IMbs (described above) and return IMbs. With the proper equipment, these barcodes are assigned and applied to the appropriate materials so that voters and election officials can track completed ballots returned through the USPS mailstream.

Among 2020 voters, the ability for a voter to follow the path of their ballot return through to receipt by election officials took on new importance, with the critical younger voter group being most likely to track their ballots, the Pew research team reported.

3 | A CLOSED-LOOP PRODUCTION WORKFLOW IS CRITICAL

The number of voters choosing to cast their ballot by mail was higher in 2020 than ever before. In addition to several states that already conducted all-mail voting, numerous additional states made drastic changes and expansions to the availability of VBM. That environment highlighted how necessary it is to ensure that every single ballot is mailed to the correct voter — something that can only be done at scale using intelligent technology and efficient, secure workflows.

To create the necessary, secure, closed-loop production workflow that accomplishes this goal, a VBM print and mail partner must implement multilevel security, tracking and data integrity protocols through every step of the process.

The production workflow should accommodate inline printing of the unique content from each voter file. In addition, it should incorporate a security crosscheck system that employs 2D barcodes and multiple cameras to verify the matching of all components of a ballot and envelope packet throughout production.

The workflow must apply real-time auditing at each stage of the process to ensure 100 percent chain of custody.

To take it one step further: Your print and mail partner must be completely facile with their workflow and be able to help you understand it and how they will guarantee that all ballots are mailed correctly.

4 **TRANSPARENCY AND REPORTING PROTECT ALL PARTIES INVOLVED**

The U.S. Election Assistance Commission has reported that the most significant security discussions around VBM ballots have traditionally surrounded "status unknown" ballots, which are those that are mailed out but are not returned, either by mail or to a physical location.

Here, it's evident that full transparency and data reporting throughout the entire VBM process help to ensure election integrity, protecting the municipality, the VBM partner and, ultimately, the voter.

Election officials and voters should have access to real-time tracking data, including

when records were processed, when the print and mail partner put the packets into the mail stream, when the postal service scanned them at various points and delivered them to the voter, when the voter mailed the returning ballot, when the postal service scanned it, and when it was delivered to election officials.

> **To accomplish this goal, a VBM partner must have the resources and technical know-how to manage the data and fulfill production, along with the platform to aggregate the two efforts.**

5 **TECHNOLOGY AND EXPERIENCE ARE PREREQUISITES IN HANDLING VBM FULFILLMENT**

As described in the sections above, a VBM election effort is not as simple as a traditional printing or mailing job that any local business might fulfill. Instead, it's a complex operation that should be managed by a team of experts with relevant experience and the right technology on demand.

For that reason, partner selection is among the most important tasks in the process.

> **It's key to conduct a thorough search for a partner early on, rather than finding out too late that you made the wrong choice.**

We recommend that you look for a partner who can work as a consultant as well as a printing and mailing house, ensuring the accurate execution of the stringent VBM process from conception to completion. This includes verifying that the partner has the resources and experience to:

- Ensure ballot printing, mailing and scanning integrity

- Meet tight deadlines

- Implement security protocols, redundancy plans and a chain of custody

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Since 1905, Fort Orange Press has been a trusted election partner and is the Northeast's foremost ballot printing and mailing expert. In anticipation of increased vote-by-mail initiatives, Fort Orange Press escalated investments in technology and personnel to provide the most efficient, accurate and secure election program available, *anywhere*.

Fort Orange Press continues to expand its service footprint as more states are looking for an end-to-end solution that includes data management, processing, intelligent printing and mailing as well as transparent tracking and reporting tools.

Election officials today need a partner with depth and breadth of experience and the expertise to deliver.

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Email election@fortorangepress.com
Call (800) 777-3233

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