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1. Roles and Responsibilities

- a. Moderator (Peter Gossels)
- b. Assistant to the Moderator (Dennis Berry)
- c. Town Clerk (Lois Toombs)
- d. Check-in staff (Wayland citizens appointed by Town Clerk)
- e. Tellers (Wayland citizens appointed by Assistant to the Moderator)
- f. Handset Issuance Lead (OTI)
- g. Handset Issuance Staff(OTI)
- h. Handset Recovery Staff (OTI): posted at building exits
- i. Electronic Voting System Installation staff (OTI)
- j. Handset Return Station staff (OTI)
- k. Tech Lead (OTI): operates the Electronic Voting System
- l. Town Meeting Lead (OTI): coordinates all tasks for which OTI is responsible
- m. ELVIS staff
- n. WayCAM staff (Ken Isaacson, Jim Mullane)
- o. Middle School Facilities Manager (Pat Morris)

2. Pre-Meeting and Pre-Session Tasks

a. Pre-Meeting Training Tasks

1. Develop and record 5-minute “How to Vote Electronically” video (ELVIS, WayCAM)
2. Develop “How to Vote Electronically” article for Town Crier, Town Web Site, Town Meeting Warrant (ELVIS)
3. Produce “Interim Report” (ELVIS)
4. Post videos on Town Web Site and YouTube (ELVIS)
5. Submit “How to Vote Electronically” to Town Crier, Town Web Site, Town Meeting Warrant (ELVIS)
6. Submit “Interim Report” to Town Meeting Warrant
7. Submit Radio Frequency power output levels from Electronic Voting Equipment to Town Meeting Warrant

b. Pre-Meeting Setup and Testing Tasks

1. Install two 20A circuits in Middle School Gym cage (Middle School Facilities Manager)
2. Install AC sockets for transceivers in Middle School Gym (Middle School Facilities Manager)
3. Install and test Electronic Voting System, including backup components (OTI)
 - a. AC Power (extension cords, multi-outlet sockets, UPS)
 - b. Transceivers
 - c. Voting PC
 - d. Connection to Video Display System (if present)
 - e. Roster Server
 - f. Check-in laptops and scanners
 - g. Handsets (batteries, connectivity, configuration)
 - h. Handset containers (Check-in, Recovery)
4. Install and test cables and VPN boxes linking Gym, and Auditorium (OTI, Middle School Facilities Manager)

c. Pre-Session Setup and Testing Tasks

1. Restore and test any Electronic Voting System components removed between Sessions (OTI)
2. Initialize Handset roster (OTI)
3. Initialize Electronic Voting System (OTI)
4. Place Handsets into containers by room (OTI)
5. Show Checkers how to work with Handset Issuers (OTI, ELVIS)
6. Deploy Handset Recovery Staff and Handset Recovery Containers (OTI)
7. Setup a “Manual Counting Section” and assign a 2-person Teller team to convey its Ballots (Assistant to the Moderator)
- 8. Prepare Identification Cards and Seating Maps for distribution by the Electronic Voting Help Desk for distribution to Manually Counted voters (Assistant to the Moderator)**
9. Prepare paper Ballots and pens for the “Manual Counting Section” and for handset failures, and distribute them to 2-person Teller teams (Assistant to the Moderator)
 - a. Ballots should provide separate sections that capture a missing vote (3.c.7.b) and a changed vote (3.c.7.c)
10. Setup for Teller Audits (OTI Town Meeting Lead, Assistant to the Moderator)
 - a. Issue each Teller a handset
 - b. Issue each Teller a printed “Teller code”
 - c. Conduct a test vote
 - d. Print and verify Teller votes
11. Prepare for Handset Failures (OTI Town Meeting Lead, Assistant to the Moderator)
 - a. Designate two Teller Teams responsible for Handset Failures (Assistant to the Moderator)
 - b. Use Welcome System to pre-issue two handsets to each Handset Replacement Teller Team for use as replacements, using special voter names TellerRep-1 .. TellerRep-4 (OTI)
 - c. Provide a Replacement Handset List for each Teller Team (OTI)
 - d. Power-down all replacement handsets so they don’t inadvertently generate votes (OTI)
 - e. Distribute pre-issued Replacement Handsets and Replacement Handset Lists to handset replacement Teller Teams (OTI)
12. Setup and staff Electronic Voting Help Desk (ELVIS)
 - a. Print copies of “How to Vote Electronically” and “Electronic Voting Handout” (Jon Sieber)

13. Identify necessary signage and print signs (ELVIS: Dave Bernstein, Jon Sieber)

3. In-Session Activities

a. Check-in and Handset Issuance, Return from Permanent Departure

1. Checker locates Voter in "Book" and notes whether Voter has previously checked in to this Session
2. **If Voter cannot use a handset, Checker directs voter to the Electronic Voting Help Desk**
3. If Voter is joining this Session for the first time, Handset Issuer
 - a. removes Handset from current room container
 - b. optically scans Barcode on back of Handset into Welcome System
 - c. optically scans Voter's Barcode in "Book" into Welcome System, overriding "handset already assigned"
 - d. Handset Issuer gives Handset to Voter, and directs Voter to appropriate room
 - e. Welcome System adds Handset to Roster and deactivates Voter's previously-issued Handset (if any)
 - f. Route Voters claiming to be physically incapable of using a Handset to Electronic Voting Help Desk
3. If Voter has previously checked in to this Session, Handset Issuer
 - a. optically scans Voter's Barcode in "Book" into Welcome System
 - b. if Welcome Station indicates Voter's previously-assigned handset has not been Returned, route Voter to Electronic Voting Help Desk; otherwise issue a Handset as described in 3.a.2

b. Introduction

1. Moderator explains rules governing Electronic Voting
2. Moderator explains how to vote: which buttons to push, voting window
3. Moderator explains what to do if Handset fails
4. Moderator conducts several test votes

c. Vote

1. Moderator cues Tech Lead that vote is imminent (suggestion: announce "Prepare to Vote")
2. Town Meeting Lead cues Tech Lead to transfer Voting Roster (unless re-vote), and when complete indicates readiness to Moderator
3. Moderator announces that the voting window is open (suggestion: announce "Please Vote")
4. Town Meeting Lead cues Tech Lead to open the voting window for 30 seconds
5. Tech Lead opens the voting window for 30 seconds
6. Town Meeting Lead indicates to the Moderator that the voting window has closed
7. Moderator announces that the voting window is closed (suggestion: announce "We'll now tally the vote")
8. Town Meeting Lead either reports an Electronic Voting System irregularity (malfunction, attack) to the Moderator, or cues the Tech Lead to display Electronic Voting results on the Moderator's Monitor
9. Tech Lead displays Electronic Voting results on the Moderator's Monitor
10. Each Handset Replacement Teller Team scans for Voters claiming Handset Failure, and renders assistance to each
 - a. The Teller team checks the Voter's Handset
 - b. if the Voter's Handset's Display does not indicate a confirmed vote, the Teller team provides the Voter with a paper Ballot and pen, and then conveys the Ballot to the Moderator with instructions to increase the count
 - c. if the Voter's Handset's Display indicates a confirmed vote, the Teller team provides the Voter with a paper Ballot and pen, and then conveys the Ballot to the Moderator with instructions to increase one count and decrease the other count
 - d. the Teller Team takes possession of failed Handset, powers on Replacement Handset, and issues it to Voter, recording Voter's name on Replacement Handset list
 - e. the Teller Team gives the failed Handset and Voter name to Handset Return Station staff
 - f. Quarantine failed Handset (Handset Return Station staff)
11. the Teller team responsible for the "Manual Counting Section" conveys Ballots from Voters in this section to the Moderator
12. The Moderator declares the vote on the motion before the town meeting
13. Town Meeting Lead cues Tech Lead to print vote results
14. Tech Lead prints vote results
15. Town Meeting Lead conveys printed vote results to the Moderator
16. Town Meeting Lead cues Tech Lead to clear the Voting database
17. Tech Lead clears Voting database

d. Audit (optional spot check)

1. The Moderator announces an Audit
2. The Town Meeting Lead cues the Tech Lead to print Teller votes
3. Tech Lead prints Teller votes
4. The Town Meeting Lead conveys printed Teller votes to the Assistant Moderator
5. The Assistant to the Moderator distributes printed Teller votes to the Tellers, and reports any discrepancies between votes shown on Teller handsets and the printed votes to the Moderator

e. Permanent Departure

1. Handset Recovery Staff collects Handsets from exiting Voters
2. Handset Recovery Staff collects returned Handsets from exits every 10 minutes, and conveys them to the Return Station, which removes them from the Voting Roster

4. Post-Session and Post-Meeting Tasks

a. End-of-Session

1. Handset Return Station Staff scans returned Handsets to remove them from Roster
2. Failed Handsets are segregated (OTI)
3. Tech Lead prints list of Voters who failed to return Handsets or Replacement Handsets
4. Electronic Voting Help Desk staff contacts Voters who failed to return Handsets

b. End-of-Meeting

1. Remove Electronic Voting System (OTI)
2. Remove cables linking Gym, Cafeteria, and Auditorium (OTI, Middle School Facilities Manager)

c. Submit Final Report

1. Assessment of Handset-based Electronic Voting at April Town Meeting
2. Alternatives to Handset-based Electronic Voting (e.g. SMS-based voting)
3. Recommendations

5. Contingencies

- a. Power Failure
- b. Electronic Voting System failure, reported by OTI Town Meeting Lead
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- c. Electronic Voting System reports it's under attack, reported by OTI Town Meeting Lead
 - Alert a Police officer
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- d. Teller Audit yields one or more discrepancies
 - Alert a Police officer
 - Revert to voice votes and standing counts
 - Completed votes are not revisited unless Reconsideration is proposed and succeeds
- e. Loss of connectivity between rooms, as reported by OTI Town Meeting Lead
 - Tellers will count the votes in disconnected rooms
- f. A Voter reports that his or her handset has failed
 - Handset Replacement Teller team verifies that voter is seated in the correct room; if not, no action is taken other than sending the Voter to the correct room
 - Teller team checks handset display
 - Teller team collects vote on Ballot
 - Teller team collects defective Handset, powers on and issues Replacement Handset, and records Voter's name on Replacement Handset List
 - Teller team conveys Ballot to Moderator, noting whether to increase one count, or increase one count and decrease the other count
 - the Teller Team gives the failed Handset and Voter name to OTI personnel manning Return Station
- g. A *significant* number of voters claim that the confirmed vote on their handset does not match their vote
 - Moderator initiates a Teller Audit
- h. A voter arrives mid-meeting and asks for instructions on how to vote: send to the Electronic Voting Help Desk
- i. A voter who is leaving the building permanently refuses to return his or her handset: alert a Police Officer
- j. Insufficient Handsets: Tellers will count the vote in the room with citizens without handsets
- k. On check-in, the Welcome Station indicates that the Voter has already been issued a handset that has not been removed from the Roster
 - If Voter is joining the Session for the first time, do not remove the previously-issued Handset from the Voting Roster, and issue a new Handset per 3.a.2
 - If Voter is re-joining the Session, route the Voter to the Electronic Voting Help Desk

6. Electronic Voting Help Desk

1. Provide copies of “How to Vote Electronically” and the “Electronic Voting Handout”
2. Provide **disinfectant wipes (Lois Toombs)**
3. Accept returns of Handsets inadvertently taken from previous sessions
4. **Issues an Identification Card and Seating Map to voters who will be Manually Counted, and directs such voters to the Manually Counted Seating Area**
5. Assist returning Voters whose originally assigned Handset has not been removed from the Voting Roster by determining where the Voter deposited his or her handset on exiting, expediting the removal of Handsets in that return location from Voting Roster, and escorting the Voter to the Check-In station to obtain a new Handset

7. Responsibilities by Role

- a. Moderator (Peter Gossels)
 - i. Introduce Electronic Voting
 1. Explain rules governing Electronic Voting
 2. Explain how to vote: which buttons to push, voting window
 3. Explain what to do if Handset fails
 4. Conduct several test votes
 - ii. Cue Tech Lead that vote is imminent
 - iii. Announce that the voting window is open
 - iv. Announce that the voting window is closed
 - v. Declare the vote on the motion before the town meeting
 - vi. Accepts printed vote results
 - vii. Announces a Teller Audit
 1. For no particular reason
 2. If a *significant* number of voters claim that the confirmed vote on their handset does not match their vote
 - viii. Alert a police officer if an attack on the Electronic Voting System is reported by the Town Meeting Lead or if a Teller Audit yields discrepancies
- b. Assistant to the Moderator (Dennis Berry)
 - i. Setup a “Manual Counting Section” and assign a 2-person Teller team to convey its Ballots
 - ii. Prepare paper Ballots and pens for the “Manual Counting Section” and for handset failures, and distribute them to 2-person Teller teams
 - iii. **Prepare Identification Cards and Seating Maps for distribution by the Electronic Voting Help Desk for distribution to Manually Counted voters**
 - iv. Setup for Teller Audits
 - v. Prepare for Handset Failures
 - vi. In an Audit, distributes printed Teller votes to the Tellers, and reports any discrepancies between votes shown on Teller handsets and the printed votes to the Moderator
- c. Town Clerk (Lois Toombs)
- d. Check-in staff (Wayland citizens appointed by Town Clerk)
 - i. Check-in each voter
 - ii. **If Voter cannot use a handset, direct voter to the Electronic Voting Help Desk**
 - iii. Point to each voter’s barcode
 - iv. Confirm last 4 digits of voter’s barcode with Handset Issuer

- e. Tellers (Wayland citizens appointed by Assistant to the Moderator)
 - i. Handset Replacement Teller Team
 - 1. scans for voters claiming handset failure
 - 2. verifies that voter is in correct room
 - 3. determines whether no vote was submitted, or incorrect vote was submitted
 - 4. provides voter with ballot
 - 5. records voter's name on Replacement Handset list
 - 6. provides voter with replacement handset and takes possession of failed handset
 - 7. conveys Ballot to Moderator
 - 8. gives failed handset to Handset Return Station staff
 - ii. Teller team responsible for the "Manual Counting Section" conveys ballots from Voters in this section to the Moderator during each vote
- f. Handset Issuance Lead (OTI)
 - i. Place Handsets into containers by room
 - ii. Show Checkers how to work with Handset Issuers
- g. Handset Issuance Staff(OTI)
 - i. Scan handset to be issued
 - ii. Scan voter's barcode
 - iii. Confirm last 4 digits of voter's barcode with Checker
 - iv. If voter not already checked in or previous handset returned, issue handset to voter
 - v. If voter already checked in and previous handset not returned, route voter to Electronic Voting Help Desk
- h. Handset Recovery Staff (OTI): posted at building exits
 - i. Deploy Handset Recovery Staff and Handset Recovery Containers
 - ii. Collect handsets from exiting Voters
 - iii. Convey collected handsets to Return Station every 10 minutes
- i. Handset Return Station Staff (OTI)
 - i. Accept and quarantine failed handsets
 - ii. Removed returned handsets from Voting Roster
- j. Electronic Voting System Installation staff (OTI)
 - i. Install and test Electronic Voting System, including backup components
 - ii. Install and test cables and VPN boxes linking Gym, and Auditorium
 - iii. Restore and test any Electronic Voting System components removed between Sessions
 - iv. Remove Electronic Voting System
 - v. Remove cables linking Gym, Cafeteria, and Auditorium
- k. Tech Lead (OTI): operates the Electronic Voting System
 - i. Initialize Handset roster
 - ii. Initialize Electronic Voting System
 - iii. Open the voting window for 30 seconds
 - iv. Display Electronic Voting results on the Moderator's monitor
 - v. Prints vote results
 - vi. Clears Voting database
 - vii. Prints Teller votes
 - viii. Prints list of voters who failed to return Handsets

- I. Town Meeting Lead (OTI): coordinates all tasks for which OTI is responsible
 - i. Setup for Teller Audits
 - ii. Cue Tech Lead to transfer Voting Roster (unless re-vote), and when complete indicate readiness to Moderator
 - iii. Cue Tech Lead to open the voting window for 30 seconds
 - iv. Indicate to the Moderator that the voting window has closed
 - v. Report an Electronic Voting System irregularity to the Moderator or cue the Tech Lead to display Electronic Voting results on the Moderator's monitor
 - vi. Cues Tech Lead to print vote results
 - vii. Conveys printed vote results to the Moderator
 - viii. Cues Tech Lead to clear the Voting database
 - ix. Cues Tech Lead to print Teller votes
 - x. Conveys printed Teller votes to the Assistant Moderator
- m. ELVIS staff
 - i. Develop and record 5-minute "How to Vote Electronically" video
 - ii. Develop "How to Vote Electronically" article for Town Crier, Town Web Site, Town Meeting Warrant
 - iii. Produce "Interim Report"
 - iv. Post videos on Town Web Site and YouTube
 - v. Submit "How to Vote Electronically" to Town Crier, Town Web Site, Town Meeting Warrant
 - vi. Submit Radio Frequency power output levels from Electronic Voting Equipment to Town Meeting Warrant
 - vii. Show Checkers how to work with Handset Issuers
 - viii. Setup and staff Electronic Voting Help Desk
 - 1. Provide copies of "How to Vote Electronically" and the "Electronic Voting Handout"
 - 2. Aid Voters requesting assistance, both before and during the meeting
 - 3. Provide [disinfectant wipes \(Lois Toombs\)](#)**
 - 4. [Issue an Identification Card and Seating Map to voters who will be Manually Counted, and direct such voters to the Manually Counted Seating Area](#)**
 - 5. Assist returning Voters whose originally assigned Handset has not been removed from the Voting Roster by determining where the Voter deposited his or her handset on exiting, expediting the removal of Handsets in that return location from Voting Roster, and escorting the Voter to the Check-In station to obtain a new Handset
 - ix. Identify necessary signage and print signs
 - x. Submit final report
- n. WayCAM staff (Ken Isaacson, Jim Mullane)
 - i. Develop and record 5-minute "How to Vote Electronically" video
- o. Middle School Facilities Manager (Pat Morris)
 - i. Install two 20A circuits in Middle School Gym cage
 - ii. Install AC sockets for transceivers in Middle School Gym
 - iii. Install and test cables and VPN boxes linking Gym, and Auditorium
 - iv. Remove cables linking Gym, Cafeteria, and Auditorium