

Recruiting and Training Observers

A Field Guide for Election Monitoring Groups



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This field guide is designed as an easy-reference tool for domestic non-partisan election observers. Field guides are intended to complement other reference tools available on domestic election observation, in particular the NDI handbooks:

- ✓ How Domestic Organizations Monitor Elections: An A to Z Guide
- ✓ The Quick Count and Election Observation
- ✓ Building Confidence in the Voter Registration Process
- ✓ Media Monitoring to Promote Democratic Elections
- ✓ Promoting Legal Frameworks for Democratic Elections
- ✓ Monitoring Electronic Technologies in Electoral Processes

These handbooks and other materials are available on the NDI website: www.ndi.org

The Recruiting and Training Observers field guide includes best practices for selecting and preparing observers for a successful observation effort.

This field guide is part of an ongoing series of guides to facilitate election observation efforts by domestic monitoring groups in the Middle East and North Africa.

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1. Planning for Recruitment and Training

It is important to plan ahead of time for the recruitment and training of observers. Even prior to the announcement of elections, your group can discuss its needs for the election observation project and its approach to the key issues of recruitment and training. A recruitment plan and training calendar can be prepared for use regardless of when the election is called; instead of citing specific dates in the calendar, you can base the timeline on how far in advance of Election Day certain trainings and other benchmarks must be held. This will also allow your group to react quickly, should an unexpected or “snap” election be called. Here are some basic issues to consider when planning for recruitment and training:

How many volunteers do you need?

Your recruitment and training plans depend on the size and scope of the operation you plan to conduct as well as other factors such as:

- ✓ The Duration of the Observation Period
Do you want to field long-term observers who will monitor the pre-election period, or are you planning to only field observers for Election Day? Long-term observers are usually few in number, but they must be more skilled and willing to make a longer-term commitment than Election-Day observers.
- ✓ Level of Election Day Coverage
Is there a reason for comprehensive coverage of polling stations, or is it possible to observe a representative sample, which would require fewer

observers? Will you cover the whole country with your Election Day observation? Or focus your efforts on particular areas?

How many volunteers do you already have?

Make an inventory of all the people you know who are available to observe, either as long-term observers or Election Day observers. Are there other organizations in your network that have volunteers available?

What are the job requirements?

Observers will need to be able to read and write. Will they need to be in good physical condition to walk long distances? Are there certain language skills they will need in various parts of the country? Are there other requirements to consider?

How will the training program be implemented?

Levels of funding, size of the country, and capacity level should all play a role in determining whether a centralized training program will be more effective than a Training of Trainers (ToT) approach, or whether mobile teams of elite trainers will be more effective than a National Training Day.

When will observer trainings be conducted?

It is good practice to train observers as close to Election Day as possible, so they do not forget what they have learned and any last minute changes to the election procedures can be reflected. However, this is not always possible and there may be reasons to hold trainings earlier, for example because of accreditation deadlines.

[Tip] Budget for Proper Training

The amount of money in your budget will impact your recruitment and training plan, but make sure you plan for adequate training of observers. Fewer well-trained observers are much more effective than a larger group of poorly-trained observers.

2. Recruitment of Observers

Successful volunteer recruitment is critical to any observation effort. Observers will be your “eyes and ears” in the field and you cannot conduct election observation without them. Do not underestimate the amount of effort needed to find willing and capable volunteers. Be sure to allow adequate time for your recruitment drive.

Set Recruitment Criteria

Consider what requirements your group needs in an observer and strictly adhere to your recruitment criteria. Recruiting an observer who does not meet the criteria might cause problems later in the process.

Publicize Your Campaign

Consider how you can most effectively communicate to the public that you are recruiting election observers. Is it possible that a media outlet (TV, radio, newspapers, social media, etc.) might sponsor a message? Or will you rely on posters and canvassing? What is the message your group wants to communicate?

Approach Pre-Existing Organizations

The most effective way to find interested and capable volunteers is by approaching pre-existing civic organizations that might have members who are interested in election observation. In many countries, faith-based, women's, and youth groups have been active in election observation.

Ask Volunteers to Recruit Peers

New recruits are usually enthusiastic about the chance to observe and willing to engage friends and family. This is a simple way to quickly expand volunteer networks.

Hold Recruitment Meetings

Once you identify potential volunteers, it is useful to invite them to a recruitment meeting to explain what election observation is and what is expected of election observers. Be candid about the requirements of the job as well as your group's ability to cover expenses. Also explain the code of conduct and the need to be strictly non-partisan.

Keep a Volunteer Database

Ask volunteers to fill out an information card / sheet with their basic details and contact information. If possible, enter this information into a computer database. However it is important to store this information securely and ensure that it is not used for any unintended purposes.

Sign an Observer Pledge

Some observer groups ask their volunteers to sign observer pledges that they understand the code of conduct and will act in a non-partisan manner. This is an effective way to emphasize the importance of these principles to your new recruits.

[Tip] Aim for Diversity in Recruiting

Try to recruit observers who reflect different sectors of society. Consider ethnicity, language, religion, social class, age and gender when selecting observers. Having a diverse group of observers will strengthen the credibility of your observer group and help to counter any allegations of bias.

3. Approaches to Training

There are several possible approaches to training large groups of people. Which approach an observer group chooses for training observers will depend on the infrastructure and size of the country, the number of people to be trained, time and budget constraints, and staff availability. While it might be possible for long-term observers to come to the capital to participate in a centralized training, this may not be possible for hundreds or thousands of Election Day observers.

Below are the three most common models for observer training, all of which have advantages and disadvantages. It is also possible to use a combination of approaches.

Pyramid / Cascade / Step-Down Training

In the “pyramid”, “cascade”, or “step-down” training model, master trainers from the observer group headquarters train regional trainers, who travel back to their regions and train local observers in their region. More levels can be added, if necessary, depending on the size of the country and the

number of people to be trained. The advantage of the pyramid model is that it is time-efficient and cost-effective, helps build regional and local capacity, and strengthens regional networks. The disadvantage is that, as you “step down” a level, trainings can lose a degree of uniformity and might not be the same quality as the initial training.

Mobile Training Teams

Another commonly used model for training is to send teams of trainers to various regions of the country to train observers directly. This model requires a core group of central staff to devote time to training, which may take needed personnel away from headquarters during a key period. However, if funding allows, the observer group can hire master trainers solely for this purpose and maintain central office staff at its headquarters. The advantage of this approach is that it allows headquarters to ensure greater quality control, and observers around the country receive relatively uniform training. The disadvantage is that this approach takes more time to implement, particularly in a large country or a country with poor infrastructure, and does not involve regional coordinators in a direct way.

National Training Day

It can be useful to hold a single “National Training Day” when observers around the country are trained in one day. The advantages of this model are that it ensures a relatively high quality control and is the most time-efficient approach. It is particularly useful in small countries and ones with good infrastructure. The disadvantage of this model is that it requires significant organization and is not cost-effective, particularly in large countries. It often requires that a large

number of trainers and / or observers must travel simultaneously to locations all over the country.

[Tip] Invite Media to Visit Your Training Site

Trainings can offer good opportunities to publicize your observation effort. Consider inviting members of the media to visit your training site so that they can learn more about your group's efforts and help raise public awareness of your observation mission. This is a good investment in relationship-building that could help your group to attract greater media coverage of your public statements.

4. Training the Trainers

While much of your energy and resources are likely to be spent training large numbers of Election Day observers, it is equally important to plan carefully to train the trainers.

Master Training

Regardless of the training model your group adopts, you will need a core group of master trainers who will train others. This group might be contract trainers, central office staff, or regional coordinators. Whoever they are, they will play an important function and need to be properly trained to be trainers. The training coordinator, or whoever among central office staff is responsible for overseeing training, is usually the person who leads the train-the-trainers course.

Training Techniques

While the content that is to be delivered at trainings is important, it is equally important to ensure that trainers are skilled at delivering that content to observers. When training the master trainers, make sure you include such topics as agenda preparation, how to lead discussions, and how to prepare role-play activities. It can be useful to break into groups and ask each master trainer to lead a mock training in front of colleagues who then offer a critique of what the person did well and what they can improve upon.

[Tip] Create Master Trainer Teams

It is difficult for any trainer, no matter how experienced, to remember every aspect of a training. It can also be exhausting for one trainer to conduct a full day of training alone. To minimize errors and workload it is beneficial to pair trainers and have them work together to conduct trainings for regional staff or observers.

5. Training Long-Term Observers

Depending on the scope of your group's observation activities during the pre- or post-election period, you might need to have one or more trainings for long-term observers focusing on particular aspects of the electoral process.

- ✓ If your group is assigning long-term observers to cover a broad range of electoral issues, each issue area should be covered in the training, such as:
 - Voter Registration

- Candidate Nomination
 - Media Access
 - Campaign Period
 - Complaints & Appeals
 - Electoral Violence
- ✓ Training of long-term observers should focus in particular on investigation skills such as how to distinguish hearsay from fact, how to accurately record direct observations, and how to verify information gathered indirectly from other sources.
 - ✓ If your group is carrying out specialized observation of certain aspects of the pre-election period (e.g. voter registration, media access, election-related violence), then it is likely you will need to have a more specialized training on those topics.

[Tip] Consider Conflict Resolution

Long-term observers must be careful to avoid engaging in political arguments in order to retain their non-partisan reputation. However, observers will often face sensitive situations and can play an important role in mitigating conflict or violence. Thus, it may be useful to include a conflict-resolution component as part of a training session for long-term observers.

6. Training Election Day Observers

Depending on your objectives, resources, and deployment strategy, your group may train hundreds or even thousands

of observers. It is important that trainers are provided with a curriculum that will be easy to replicate across the country.

- ✓ The length of the training will depend on budget and time constraints; however, Election Day observer trainings can usually be conducted in one day.
- ✓ It is not necessary or practical to train observers on every single aspect of the election process. Observers should be provided with essential information (voting, counting, possible violations, etc.) to enable them to observe on Election Day.
- ✓ The two most important elements of every Election Day observer training session are: *How to Record Your Findings* and *How to Transmit Your Findings*. Be sure to devote particular attention and time to these two elements. If these elements are not completely clear to observers, your group will run the risk of gathering inaccurate information or being unable to release statements in a timely manner.
- ✓ Trainings should be as participatory as possible. Allow time for questions and answers, simulation exercises, and role-play exercises for observers.

[Tip] *Keep Participation Numbers Manageable*

While time and budgetary constraints play a role in determining the size of your training sessions, smaller groups often yield better-trained observers. In smaller groups, observers are able to participate effectively, ask questions, and reduce confusion. If possible, try to limit participation in trainings to 25-30 participants or less.

7. Preparing a Training Agenda

The training agenda will be tailored to meet the specific objectives of your observation effort. However, as a starting point, the following are topics that are typically covered in an Election Day observer training:

- ✓ Welcome, Introduction & Objectives;
- ✓ Explanation of non-partisan election observation and the role of observers in the election process;
- ✓ Overview of election administration, voting and counting procedures and possible violations;
- ✓ Distribution of observation forms, training manuals and other materials to be used;
- ✓ How to record observer findings;
- ✓ How to transmit observer findings;
- ✓ Instructions for observers on Election Day; and
- ✓ Code of Conduct for election observation.

[Tip] *Have Everyone Sign a Code of Conduct*

It is critical that observers understand the importance of taking a non-partisan approach to observation. Having all observers read aloud and sign a Code of Conduct during a training session is a useful exercise. A Code of Conduct for non-partisan citizen election observers is part of the Declaration of Global Principles for Non-Partisan Election Observation. Find the Declaration at www.gndem.org

8. Maintaining Your Volunteer Network

Through election observation, your group will recruit a network of capable volunteers. This is a valuable resource and, to the degree possible, it should be maintained. Depending on the objectives of your group, you may want to conduct activities in the future that require the participation of large numbers of volunteers. Or you may wish to observe elections in the future, in which case it is much easier to begin with an inventory of experienced volunteers rather than starting at the beginning. Regardless of your future plans, your group should find ways to recognize the efforts of your observers and keep them engaged.

Award certificates of participation

Giving personalized certificates to observers is a cost-efficient way to show appreciation to volunteers.

Distribute your group's statements to all observers

Observers will be interested to see how their findings contributed to a broader effort in the form of public statements. Also, observers will likely share statements with their friends and family, increasing the reach of your findings, particularly in areas with limited media access or in political contexts where media is not likely to publicize your findings.

Consider holding post-election appreciation events

National and regional coordinators may organize social events to demonstrate their gratitude for a job well done.

Maintain a volunteer database

Ask volunteers whether they would like to be considered for future activities. Make an effort to keep the volunteer database updated.

Distribute newsletters to your volunteer list

Keep volunteers updated on the activities of your group and political developments through periodic newsletters. This is particularly easy if you distribute them electronically.

Identify activities where volunteers might be needed

Think of ways that volunteers might remain active with your group in the future, through additional activities or election observation efforts. One possible follow-on activity is to run an advocacy campaign based on your election findings and recommendations. Such a campaign could benefit from volunteer participation.

[Tip] Make Use of Social Media

Social media outlets such as Facebook and Twitter provide an easy and cost-efficient way to remain in touch with volunteers after and in between elections. They can also be excellent tools for recruiting volunteers prior to future election observation exercises.



The **National Democratic Institute (NDI)** is a non-governmental, non-profit organization established in 1983 working to strengthen and expand democracy worldwide. Calling on a global network of volunteer experts, NDI has worked to form and develop non-partisan domestic election monitoring groups in more than 70 countries and has helped to develop regional associations of monitors in Africa, Asia, Eastern Europe, Eurasia, Latin America and the Middle East.