PROCESSING BALLOTS RETURNED AS UNDELIVERABLE AND TELEPHONE REQUESTS FOR BALLOTS

Alternative Methods Of Filing And Record-Keeping

Familiarize yourself with the membership roster that accompanied the mailing labels or data package provided by the International Union. Locate the sequence number and Employer Number on the roster. This information will be necessary for dealing with phone requests for ballots.

Filing. You should keep all of the paperwork generated in the process of updating address information on returned ballot packets as well as responding to telephone requests for duplicate ballots in an orderly fashion. A simple file system includes folders designed to hold copies of returned envelopes ("CREs") and Request For Ballot forms from which you will be working as you search for updated addresses and prepare labels. Suggested files include:

-- **CRE COMPLET ED:** holds CREs where an updated address has been found and a label prepared.

-- **CRE EMPLOYER:** holds CREs (grouped by employer) ready for phone contact with employers.

-- **CRE END SEARCH:** holds CREs after all searches have been completed and no new address found.

-- **CRE SEARCH 2:** holds CREs where no updated address is available from the employer until the CREs are checked through alternative methods as described below.

-- **MESSAGE:** holds CREs or Phone Requests, in cases where you have called the member and are waiting for a return call.

-- **REQUESTS IN:** holds Phone Requests prior to their processing.

-- **REQUESTS OUT:** holds Phone Requests after they have been processed.

Record Keeping Systems. From time to time during and after the process, you may be called upon to provide information regarding the processing of ballots. A good record keeping system will help you maintain an accurate count of:

- The number of ballots that have been returned as undeliverable.
- Remails -- The number of addresses you have updated and mailed a ballot.
- The number of Request For Ballot forms received
- The number of ballots mailed as a result of Requests For Ballots.
- The persons / addresses to whom you have mailed ballots.

- <u>Duplicates</u> – The number of ballots mailed in response to requests from members whose names appear on the roster you received from the International union and are thus assumed to have received a ballot in the initial mailing.
- <u>New Ballots</u> – The number of ballots mailed to members whose names do not appear on the roster you received from the International.

<u>Alternative Forms of Record-Keeping</u>.

- <u>The Roster</u> that you received from the International with the ballot mailing labels or data can be used to record your activity. For example:

  - Highlight in yellow each member whose original ballot is returned as undeliverable.
  - Highlight in blue each member who requests a ballot. (If this entry has been previously marked as returned mail the highlight marking will turn the entry green)
  - Highlight in red/orange each member who receives a new ballot due to a returned mail piece for which an updated address has been found. (You will be highlighting over yellow). If the roster is your sole source of record keeping, write in any updated address information below the member's entry.
  - Add to the end of the roster (attach additional pages if necessary) the name and address of any individual not already listed who is mailed a ballot.

- <u>A Simple System</u>. The roster, while useful as a record-keeping tool, is often cumbersome to use if processing a large number of undelivered or ballot requests. A more flexible system that has been used successfully in other elections uses some version of the forms attached under Tabs 22 and 23. The LEDGER SHEET (which can be kept in a binder) is helpful for tracking mailings and phone requests for ballots on a daily basis. The REQUEST FOR BALLOT form provides a way to ensure the individual taking the requests asks the right questions for your records.

- <u>Computerized Systems</u>. A computer database or word processing program, where available, is very flexible to operate and makes generating labels and reports simple. This is very helpful for elections in large locals. For smaller locals, well-kept files and a typewriter for the mailing labels are probably enough.

  WordPerfect and Microsoft Word offer mail merge features that allow you to create a format or data file that can be adapted for mailing labels and reports. Database programs such as Paradox, FoxPro, PC File, and Microsoft Access are very good as well. When setting up your data base or mail merge file keep in mind the categories by which you may wish to sort data: last name, mail code, employer. Set-up your data and label format and test the printout as far in advance is possible. There are ALWAYS glitches! Remember to back-up your data regularly.