

Use of this form indicates that you are part of a VoteRiders Partner Organization-led Voter ID Clinic and will share the non-personal data collected from the Clinic with VoteRiders.

PROTOCOLS – CLINIC SUPERVISOR

1. DESIGNATE THE VOTER ID CLINICS SUPERVISOR: in charge of Voter ID Clinics on behalf of the Partner

- a. Accountable to VoteRiders re: questions on establishing the Clinic, recruitment, operations, and issues encountered;
- b. Provide Clinic Supervisor's name, mailing address (if not a Partner employee, can be wherever it's convenient), e-mail address(es) and telephone number(s) to VoteRiders;
- c. Responsibilities are also reviewed in Training Video, "Protocols – Clinic Supervisor." The video is available via a non-public link sent to the Supervisor by VoteRiders.

2. A TELEPHONE NUMBER WHERE CITIZEN VOTERS MAY CALL WITH QUESTIONS PRIOR TO THE VOTER ID CLINIC OR FOR FOLLOW UP AFTERWARDS

- a. Answered by a live person who will convey phone messages to the Clinic Supervisor or Voter Advocates (trained volunteers who work at the Voter ID Clinics); or
- b. Answered by a voice-messaging system, which the Clinic Supervisor will check daily, at least weekdays.

3. IDENTIFY BY NAME AND ADDRESS THE SECURE LOCATION WHERE THE CLIENT APPLICATION FILES WILL BE KEPT AND WHERE BIRTH CERTIFICATES AND OTHER LEGAL DOCUMENTS WILL BE RECEIVED AND STORED UNTIL RETRIEVED BY CLIENTS

Keep documents in a secure place in order to protect clients' sensitive information:

- a. Intake Forms, Representation Agreements/Release of Liability and any document applications not yet mailed plus requested documents that clients choose to have delivered to Partner for pickup.
- b. If Partner designates a third-party Custodian, such as a law firm, to store these documents, Partner will:
 - i. Provide VoteRiders with the name, address, phone number and identity of the contact person of the Custodian of the documents;

- ii. Make a copy of Intake Forms including Representation Agreement/Release of Liability before they are transmitted to the Custodian; and
- iii. Create a record of clients' names, addresses and telephone numbers in order to follow up with the Custodian to ensure that the Citizen Voter (client) has ultimately received the documents needed in order to obtain voter ID.

4. RECORD AND TRANSMIT DATA TO VOTERIDERS

To assure optimal effectiveness and success of Voter ID Clinics from the perspective of Citizen Voters, donors and media, it will be extremely helpful for the Clinic Supervisor to:

- a. Collect and record data (approximately 10 items) from Intake Forms on the VoteRiders-provided Voter ID Spreadsheet to email monthly to VoteRiders after each Voter ID Clinic;
- b. Furnish to VoteRiders a good-faith accounting of out-of-pocket costs and time spent by the Partner, Clinic Supervisor, volunteers including Voter Advocates and any Custodian regarding Voter ID Clinics in the prior month; and
- c. Contact VoteRiders at VoteRiders.org/contact with any questions, so they may be answered directly and in the Guidelines section at VoteRiders.org/VoterIDClinics.

5. RECRUIT AND TRAIN VOTER ADVOCATES TO VOLUNTEER AT THE VOTER ID CLINICS

Since almost all states will permit a legal representative to apply for documents on a client's behalf when such attorney signs the application and submits a copy of the attorney's photo ID and license:

At least one Voter Advocate must be an attorney licensed in the state where the Clinic is held; and such attorney Voter Advocate who participates in a Voter ID Clinic will be identified on the Representation Agreement that clients sign.

Voter Advocates at each Voter ID Clinic:

- a. At least five Voter Advocates in addition to the Clinic Supervisor and attorney Voter Advocate, who may be one and the same;
- b. At least one Voter Advocate must be very experienced in accessing information on the Internet;
- c. Mature, capable and dedicated to helping citizens obtain the documents they need for their voter ID;

- d. Accurate and thorough to minimize the need to re-contact Citizen Voters to correct errors.

RECRUIT OTHER VOLUNTEERS

1. A Notary Public must be in attendance at the Voter ID Clinic because several states require that applicants' requests be notarized;
2. Pro bono attorney when a birth certificate must be corrected or no birth certificate exists and a Delayed Birth Certificate must be created:
 - a. Thorough, written instructions on correcting birth certificates and creating Delayed Birth Certificates comprise one of the Training Documents available by [contacting](#) VoteRiders.org;
 - b. A Training Video on correcting birth certificates and creating Delayed Birth Certificates is viewable at VoteRiders.org/VoterIDClinics;
 - c. It is not necessary for pro bono attorneys to participate in Voter ID Clinics, but they should be willing to meet with clients in their offices shortly after accepting the case.

6. PROVIDE NECESSARY EQUIPMENT AT VOTER ID CLINICS

- a. At least one computer capable of accessing the Internet and which is networked to a printer; and
- b. A copy machine to photocopy clients' documents, which may be necessary to include with their applications for records. (Per paragraph 3 above, the Clinic Supervisor may also need to photocopy the clients' Intake Forms in the event that a participating entity is to be the Custodian of the Voter ID Clinics files.)

7. PROMOTE THE VOTER ID CLINIC

To assist the greatest number of clients who will obtain voter ID and to most effectively utilize the Voter Advocates who have devoted time to training:

You should have received by now a non-public link that allows you to download a flyer and posters that can be used in promoting the Clinics.

Suggestions of where to send or display Voter ID Clinic notifications:

- a. Offices of Federal, State, and local politicians: It is in the best interest of those in public office to ensure that their constituents are able to vote. The email addresses of federal, state and local political leaders are easily obtainable from the Internet. Send a flyer with a

- brief explanation of the purpose of the Voter ID Clinic and request that the flyer be posted in the politician's office.
- b. Voter Registration offices: Call to obtain a fax number to transmit a flyer.
 - c. Food banks, soup kitchens, homeless shelters and missions: These venues rely less on email, but telephone numbers and street addresses are often available on the Internet. Call to obtain the name of a contact person and either fax or mail a flyer.
 - d. Social Service Organizations: Email addresses, telephone numbers and fax numbers are available on the Internet. It is best to call first to obtain the name of a contact person.
 - e. Churches, synagogues other houses of worship: Addresses, phone and fax numbers are available on the Internet. Fax or mail flyers with a letter explaining the reason for the Voter ID Clinic.
 - f. Geriatric hospitals, nursing and assisted-living institutions and other senior housing: Contact information is available on the Internet. Call to speak to the social worker to request permission to have the flyers posted.
 - g. Public Health Clinics and doctors' offices: Phone numbers are available on the Internet. These offices are very busy and it is often difficult to get someone to listen to you explain the reason for the Voter ID Clinic. Call to ask for the office's fax number and send your flyer with a letter explaining the purpose of the Voter ID Clinic.
 - h. Medical schools and nursing programs: Locate the general phone number on the Internet and ask the operator to connect you to the most effective person concerning the posting of a flyer to publicize this kind of Voter ID Clinic.
 - i. Unemployment offices and check-cashing stores: Make a personal visit to ask if you can post a flyer.

8. REQUEST CLIENTS TO CALL TO REGISTER FOR THE VOTER ID CLINIC

- a. Good idea to include in the Voter ID Clinic promotional material;
- b. Beneficial for clients to be advised beforehand if they need to bring identifying documentation to the Voter ID Clinic;
- c. Create a list of such pre-Clinic registration callers: name, at least two phone numbers, the types of records the prospective client requires, and the states where such records are located;
- d. Clinic Supervisor can then consult the state document Tables and
 - i. Call to advise the prospective client of any documentation he/she needs to bring; and
 - ii. Copy the necessary application and instructions to bring to the Voter ID Clinic.

9. OTHER RESPONSIBILITIES OF THE VOTER ID CLINIC SUPERVISOR

1. OVERSEE THE SELECTION OF VOTER ADVOCATES

- a. Volunteers accepted as Voter Advocates: detail-oriented, conscientious, and understand the necessity of participating in all aspects of training;
- b. Include at least one licensed attorney.

2. VOLUNTEERS WHO NEED NOT BE (TRAINED) VOTER ADVOCATES

- a. A Notary Public to participate at the Voter ID Clinic, to be contacted as early as possible to ascertain the kinds of documentation that will be acceptable as proof of identity in order for a signature can be notarized; this information will need to be communicated, preferably in advance of each Voter ID Clinic, to clients who seek to order records from states which require notarizations; and
- b. Pro bono attorneys who agree to represent clients who need to have birth certificates corrected or Delayed Birth Certificates created.

3. TRAIN THE VOTER ADVOCATES

- a. Voter Advocates will digest the written and video training materials (video is viewable at VoteRiders.org/VoterIDClinics) prior to the training session;
- b. These materials will take less than an hour to review;
- c. The training session is intended to:
 - i. Reinforce the information that the Voter Advocates have reviewed;
 - ii. Ensure they are knowledgeable of the requirements for obtaining voter ID in the state in which the Voter ID Clinic is held (Clinic State); and
 - iii. Serve as an opportunity to answer any questions they may have.

4. ASSIGN THE VOTER ADVOCATES THEIR DUTIES

- a. While all Voter Advocates will receive the same training, they may be assigned tasks which do not require them to interview clients.

- b. One person will be responsible for reception/the initial intake, writing down the names of clients, along with the types of records they are seeking and from which states; will help ensure clients are handled in the order in which they arrive and that they are referred to the correct interviewer-Voter Advocate.
- c. Some Voter Advocates will be assigned to interview clients who need records from the Clinic State.
- d. Two or three Voter Advocates should be assigned to take applications from clients who need out-of-state records.
- e. If the client has not pre-registered, the Voter Advocates who are handling out-of-state requests will have to access the application on the Internet.
- f. If there are more Voter Advocates than needed to conduct interviews, one or more can be assigned the task of explaining the voter ID and document requirements to clients.

5. REVIEW ALL PAPERWORK BEFORE CLIENTS LEAVE THE VOTER ID CLINIC

- a. All questions on the Intake Forms and applications have been answered;
- b. The writing is clear and legible;
- c. All forms have been signed;
- d. Client names are spelled correctly;
- e. All potential requirements have been satisfied, e.g., that forms are notarized, identifying documents are attached, etc.
- f. Goal of quality control: avoid having to re-contact clients to correct mistakes.

6. COLLECT ALL PAPERWORK AT THE END OF THE VOTER ID CLINIC

- a. The attorney Voter Advocate has signed where appropriate;
- b. Make photocopies of the Intake Forms and Representation Agreement/Release of Liability to store with the Partner before releasing the paperwork to the Custodian, if any;
- c. Record the names and phone numbers of the clients to keep a record of whom attended the Voter ID Clinic.

7. PROCESS THE REQUEST FOR RECORDS

- a. Oversee the processing of the applications and requests for records, unless being handled by Custodian;
- b. If a birth certificate needs to be amended or a Delayed Birth Certificate must be created:

- i. Place the case with pro bono counsel; and
- ii. Request periodic status updates from such counsel.

8. OVERSEE THE MAILING OR RETRIEVAL OF THE RECORDS ONCE RECEIVED

- a. Review the Intake Forms to determine each client’s stated preference for retrieval of the records: either by mail or in person.
- b. If the records are received by the Partner:
 - i. Call the clients who have requested to retrieve them personally and arrange a time for pick up; otherwise,
 - ii. Mail the records to clients who have requested that they be mailed.
- c. If the records are received by the Custodian:
 - i. The Custodian will mail the records to clients who have requested that they be mailed; otherwise,
 - ii. The Custodian will send the remaining records to the Clinic Supervisor, who will call those clients to arrange for pick up.

9. REPORT TO AND COMMUNICATE WITH VOTERIDERS

VoteRiders needs the following information to track the burden in time and expense that voter ID laws exact on Citizen Voters (clients), volunteers, Partner Organizations and other relevant communities. VoteRiders will use the data in its media strategy including, importantly, to highlight the depth and effectiveness of the Partner’s efforts:

- a. Email to VoteRiders the hours spent and reported by the pro bono attorneys, along with their respective normal “retail” hourly fee as well as out-of-pocket costs (e.g., printing documents) at the conclusion of the handling of the case;
- b. At the end of each Voter ID Clinic: oversee the recording and transmittal of data collected from the Intake Forms onto the VoteRiders Voter ID Spreadsheet;
- c. Email a report to VoteRiders monthly on:
 - i. The hours employed by all those who have worked on Voter ID Clinics, e.g., the Clinic Supervisor, Voter Advocates including attorney(s) and all other volunteers, Notary Public and any Custodian;
 - ii. A good-faith accounting of the out-of-pocket expenses incurred, including the cost of records requested on behalf

of clients that are necessary to obtain Voter ID, postage for mailing documents, making copies of forms and applications, printing and distributing downloadable Voter ID Clinic Marketing Tools such as posters and flyer, any compensation paid to staff proportionate to the time spent on Voter ID Clinics, etc.

- d. Contact VoteRiders at VoteRiders.org/contact with any questions, so they may be answered directly and in the Guidelines section at VoteRiders.org/VoterIDClinics.