



Sample Test Report: Ballot Usability Feedback

This document provides a basic template for writing up the feedback and/or results you obtained from the ballot testing. The goal is to communicate effectively the findings to the team in time to correct the problems that users identified with the ballots before Election Day.

What you need

- Ballot Usability Testing Plan
- Session Script
- Feedback/results from the study

Sample Test Report Template

This information can either be included on a cover page or sent out in the memo format used here. Instructions to you, the report writer, are in *gray type* throughout.

You can just use this document and change what you need to change to reflect the actual results of the study you conducted. So, make sure you delete the text above this section, and change the heading to this section to describe your study.

To: Local Elections Team
From: Ballot User Feedback Team
Date: August 7, 2006
Re: Ballot Usability Feedback Report

Title: [GenericName] Ballot Usability Evaluation
Usability Evaluation Conducted: July 26-28, 2006
Report Prepared: August 7, 2006
Report Authors: [Author Name, Author Name]
Primary Report Contact: [Name, address, e-mail, phone number]

Executive Summary

This document describes results of a usability evaluation of the ballot design for the **GenericName** Election. The usability study collected quantitative and qualitative feedback from representative voters in **GenericName** county/state on the [proposed or mock] ballot for the **GenericName** election that will be held on [Date].

This evaluation was conducted [Date] at the [Test location]. The ballot was evaluated in individual interactive sessions with 12 [12-15 recommended for the study] people who reflected the demographics of our voters.

Participants were able to XXX, XXX, and XXX. However, participants had difficulty finding XXX, XXX, and XXX. Overall, participants responded very positively to the organizational layout, usefulness and thoughtfulness of the ballot, and its appearance. Areas for improvement include: XXX, XXX, XXX, XXX, and XXX. We should tell the people who train election workers to make sure they cover XXX and XXX in the training that poll workers and others receive.

Background

The purpose of this study was to obtain comments and performance feedback on the [proposed/mockup] ballot for the upcoming GenericName election. We plan to use this information to improve the ballot before Election Day, ensuring the voter's intention is carried out and the election runs smoothly. The ballot was evaluated in one-on-one interactive usability sessions with representative voters.

Test Objectives

To identify usability issues with the ballot design using a systematic performance-based approach, we observed people who were eligible to vote doing so and noted what they did and said. Representative users were asked to cast a ballot for the mock election session.

This test was designed to answer these questions: [They should match your original research questions and what you specifically observed for during the sessions.]

- How easily and successfully did voters mark their ballots in all contests?
- How easily and successfully did voters review and mark their ballots on measures/propositions/issues?
- What questions and problems did voters have?
- Where did voters make mistakes? Were they aware that they had made mistakes? If not, why not? If so, what did they do to recover?
- What aspects of the ballot are difficult to understand?
- What do users like and dislike about the flow of ballot, e.g., navigation, organization of information, and grouping of content?

Methods

Participants

There were a total of 12 participants, 6 males and 6 females. All were registered voters. Of the 12 participants, 8 marked that their race or ethnicity was A; 2 marked B; and 2 marked C. All had voted before, though 1 said it had been "several years" since he voted.

Observers

There were two facilitators for the study. [Name], a [position] in the Department of Elections, following a script greeted participants, explained the study to them, and introduced the tasks participants were to perform during the session. [Name], a [position] in the Department of Elections, took detailed notes to gather data from the session, administered questionnaires, and asked some follow-up questions.

In addition to [name] and [name], other observers were present. Before the study in a special briefing session, the observers were instructed about how usability testing works, the importance of their involvement, and how to conduct themselves during the sessions they would observe so as not to skew the data. Observers signed up ahead of time for specific sessions to observe. We allowed two observers per session. If they were late for any session, they were prevented from observing their scheduled session. See the guidelines for observers in Attachment 1.

Below is a table listing the names, positions, and affiliations of the observers:

Name	Organization	Title/Position
XXXX	XXXX	XXXX
XXXX	XXXX	XXXX
XXXX	XXXX	XXXX
XXXX	XXXX	XXXX

Tasks

In our study, we asked participants to use the ballot to vote for [whatever they wanted | choices we provided | choices they made before seeing the ballot.] The instructions for each race were designed to “exercise” the ballot for various choices – including deliberate undervoting. [In this case, we tested the ballot after the main filing deadlines, so the ballot used in the study was close to the ballot that would be used in the actual election.] The source of the script was a joint effort between the [local elections team and the facilitator and/or usability specialist/UPA/NIST/other].

[If you asked participants to do specific tasks, list them here. These are from the examples in the Session Script.] The tasks we asked voters to perform for the evaluation were:

1. Straight party
2. Write in
3. Change a vote
4. Undervote
5. Multi-candidate race
6. Non-partisan, uncontested race
7. Non-partisan retention questions
8. [Accept]

9. [Reject]
10. [Accept]
11. Review, multi-candidate race
12. Review, change
13. Cast ballot

Test Facility

The usability sessions were conducted at [city hall/church/school – list specific location for the evaluation]. The facility was set up to be as much like a polling place as possible. The space protected the privacy of individuals and accommodated those with disabilities who participated in the study. Specifically, the room was equipped with participant check-in table (similar to a place of voting), [number] voting booths, and a mock ballot box/DRE. The facilitator directly observed the participant during the session

Participant's Voting Environment

We wanted to use an actual voting booth with the associated voting equipment that will be used in the upcoming election. Being able to simulate as much as possible the actual voting environment, including associated voting equipment makes the situation much more realistic and may point out problems that can be addressed outside the ballot design as well as with corrections to the ballot design. [Say what was different and why. Comment on whether you think the setting may have had an effect on the results.]

Test Administrator Tools

At the beginning of the session, participants completed a demographic questionnaire. At the end of the session, participants completed a satisfaction questionnaire in which they rated several statements subjectively. Then they answered several open-ended questions regarding their impressions of the ballot and voting experience.

The test was administered with the use of a moderator's guide or session script, which was used by one facilitator as a script for the session to ensure that all participants received the same instructions and tasks. A modified version was used by a note taker for collecting data. Otherwise, the facilitators behaved as poll workers would.

For a version of the moderator's guide/session script, refer to Attachment 2.

Test participants received verbal and printed descriptions of the tasks we asked them to do.

Procedure

Twelve [12-15 - actual number] participants took part in the usability evaluation of the **GenericName** ballot for the **GenericName** election. Each of the 12 [12-15 – use actual number] participants attempted to vote a ballot [to previously established instructions].

We announced the study X weeks ahead of time in [newspaper | websites (name them) | newsletters | posters | etc.] with the dates, locations, and times of the study. Participants [were compensated \$nn for their time and input | were not paid].

The individual sessions lasted 15 minutes for each participant, and included several components, all of which are included in the Session Script (to receive a copy, contact XXXXX at XXX-XXX-XXXX):

- Verbal overview description of study – We described to participants the general nature of the study and the order of activities included in the session.
- Informed consent form for human subjects – Each participant was asked to sign the Consent Form before participating.
- Demographic questionnaire – We administered a brief questionnaire to gather background information on participants' voting experience and Internet experience. [Time permitting]
- Task scenarios performance – We asked participants to pretend to vote in a real election using the testing ballot [with a list of tasks to complete | with instructions on how to vote]. Then we interviewed them about how using the ballot went, telling us what questions they had, what was confusing, and why they did what they did while voting. Having this verbal data helped us identify areas of difficulty and patterns and types of participant errors.
- Post-study questionnaire – A post-study questionnaire was administered to obtain satisfaction ratings.
- Usability Study Debriefing – We closed each session by reviewing what had happened during the session and giving participants a printed sheet with information about how to find out more about the study if they wanted to.

NOTE: It is very helpful to include a screenshot or PDF of the ballot for the reader to refer to while reading the usability report. Retaining a copy of the test ballot is important for archival purposes as well.

Usability Measures

Key usability goals included:

- **effectiveness**, which refers to how accurately and completely users are able to complete their tasks
- **efficiency**, or how quickly users are able to carry out their tasks accurately
- **satisfaction**, which relates to the subjective responses users have to the system

The *quantitative* performance measures included:

- percentage of tasks completed successfully (effectiveness measure)
- number and types of errors (effectiveness measure)

- mean time to complete the ballot (efficiency measure)

The *qualitative* measures included:

- feedback from the pre-test interview
- participant satisfaction ratings (post-study questionnaire)
- verbal feedback during and after the session
- verbal feedback during a post-study interview
- written feedback on the demographic questionnaire and post-study questionnaires

Usability Results

This is the second major technical section of the report. It includes a description of how the data were scored, reduced, and analyzed. It provides the major findings in quantitative formats.

Look at how efficient and effective the ballot was for participants. If you can do this with counts or by saying which participants had had particular successes and failures, you will have created a context within which to make decisions about how to solve design problems or give further training to poll workers. For example, you might say something like “For Contest 5, in which participants were supposed to change their vote in a particular contest, some voters (P2, P3, P10, P11) made errors because they tended not to unselect their original choice before trying to select a new name.”

Contest 1 Results – Vote for [Name] in race 1

(# of Participants successful: 10/12 (83%)

For the first contest, participants were asked to vote for [Name] in race 1.

[**IMPORTANT NOTE:** These results are fictitious, but demonstrate how you describe the performance data and the comments during the task attempt.]

- Eight out of 12 (67%) participants successfully completed the task.
- Six participants indicated they expected the candidate name to be listed on the left.
- Two participants indicated that they would normally vote straight party ticket for this task.
- Several participants said they would expect an alphabetical list in one column, rather than a two-column layout for the individual races.
- Three participants indicated that they would ask the polling people for more instructions about how to fill out the ballot.

Types of Errors

- One participant first tried to find mark a place on the ballot that would not be read by the scanner.

- Two participants had difficulty finding the candidate they wanted to vote for, so voted for someone else.

“I thought the list of names should be alphabetical by last name, but they’re mixed up and I don’t see my guy.”

Or, consider putting everything in to summary tables, such as the one below:

Errors by task

Participant	Contest 1	Contest 2	Contest 3	Measure 1	Measure 2	Review	Change	Cast	% tasks completed successfully
P1									
P2									
P3									
P4									
P5									
P6									
P7									
P8									
P9									
P10									
P11									
P12									

Time to complete the ballot

Participant	Minutes: seconds
P1	
P2	
P3	
P4	
P5	
P6	

Participant	Minutes: seconds
P7	
P8	
P9	
P10	
P11	
P12	
Average time to complete	

Satisfaction Results

Tally the answers to the post-study questionnaire in this section. Doing so will give you some context for judging voters' tolerance for working through particular problems in the ballot and help you set priorities about what to change. Focus on any areas where less than positive responses were given.

Satisfaction

These subjective ratings data are based on a 5-point scale, from 5=Strongly agree to 1=Strongly disagree.

Participant #	Easy to use	Instructions were difficult	Easy to mark	Most people would learn easily	Awkward to use this ballot	Confidence	Would need help
P1	5	5	5				
P2	5	4	5				
P3	5	4	5				
P4	5	5	5				
P5	5	4	3				
P6	5	4	5				
P7	5	4	5				
P8	5	4	5				
P9	5	4	5				

Participant #	Easy to use	Instructions were difficult	Easy to mark	Most people would learn easily	Awkward to use this ballot	Confidence	Would need help
P10	5	4	5				
P11	5	4	5				
P12	3	3	4				
Average							

If participants' ratings appear with some on the extreme ends (1 or 5), then be careful interpreting what these numbers mean. You want them to be closer to the middle, though on the higher or lower end, as appropriate to the question. Otherwise, it may mean that participants misinterpreted the question, they were unclear about how to use the ratings, or there's something about how the sessions were conducted that is skewing the ratings.

Next Steps

This evaluation yielded much useful information on the usefulness and usability of the proposed/mocked up **GenericName** ballot.

Put your recommendations here, in consolidated form rather than broken up by task.

Recommendations

Recommendations for changes to the ballot are listed in order of importance – that is, in the order that is most likely to cut down on the number and type of voter errors. Be sure to discuss specific problems and make recommendations for the specific changes that will help address these problems wherever possible.

- Change the instruction for multiple candidate races to “Vote for one, two, three, or four candidates.”
- Move the instruction for multiple candidate races out of the shaded heading box, before the list of candidates. .

Appendix 1 Screen Shots of GenericName Ballot

Page 1

[Screen Shot or PDF here]