

ELECTION MANAGEMENT

Election Management Calendar

Issued by the Elections Group



View this guide online



The Elections Group, 2022

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Understanding the Guide

Election Officials are chief executive officers of complex organizations requiring excellence across all management domains, including:

- oversight of election administration and compliance tasks
- risk management
- communications
- budgeting
- organization governance

Reliance on a task tracker can help alleviate some of the strain that comes from managing a wide swath of responsibilities in a very constricted time frame.

This election task management tool can serve as a management jumpstarter – particularly for newer election officials who may be starting from scratch, without any institutional memory. For others, it can serve as a helpful reminder as they juggle duties. And in some places, where election officials are being supported in their management duties by other parts of local government without election experience, it can help focus the discussions.

The tool can be used as is, with minor changes, but it is unlikely a perfect fit for any office. Adding or deleting tasks, changing deadlines, and assigning duties to individuals, vendors or work units, for tracking and accountability purposes, is relatively easy. Below are instructions that can help make this tool more useful.

Election officials that are interested in getting support in updating their calendar, or in using it in a formal project management tool, or even in developing a more advanced tool with help of a vendor or non-profit organization can reach out to us directly.

The calendar is a living document, so regular meetings at which the calendar is discussed and updated are essential to making best use of it.

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Instructions

Overview

This project calendar, provided in Microsoft Excel and Google Sheets, has been designed to provide election administrators with a tool to ensure all necessary tasks are completed and completed on time. It includes identification of the responsible individual or unit, partner units and dependencies, as well as a way to indicate a specific area of focus for each task.

Column Definitions

Term	Definition
ELECTION DATE (cell C3)	This is the date of the election being planned for.
-/+ DAYS FROM ELECTION	This indicates the number of calendar days before or after the election date (C3) a task needs to be started. Election Day is always calculated as day zero.
DURATION (IN DAYS)	This is the number of days a certain task will take to complete. It is mostly relevant if there are statutory or vendor deadlines that need to be met. If the event has no duration (for example you want to include a reminder or statutory deadline), simply set the duration to zero.
TASK START DATE	The date a task needs to start is automatically calculated based on the number entered in the Start +/- column. It is recommended that the cells in this column be protected to prevent the formula from being accidentally overwritten.
TASK COMPLETION DATE	This is the date a task should be completed. It is automatically calculated from the TASK START DATE and DURATION IN DAYS fields.
PRIMARY ELECTION MANAGEMENT PROCESS	This is the primary area of focus that the task relates to. See "Drop Down Lists" below to change the drop down menu.
SUB-PROCESS	This is the secondary process within each of the primary areas of focus.
TASK	The task that needs to be completed.
NOTES	Notes are anything that will be helpful for a user to know prior to engaging in the task.
RESPONSIBLE STAFF OR UNIT	This is the person, vendor, or work unit within the organization that is responsible for completing the task.
WHO ELSE IS INVOLVED (DEPENDENCIES &	Other staff, units, the Executive Team, or third-party partners, including other government departments, that might be

PARTNERS)	needed to assist, either to consult with or to help perform the task.
TASK COMPLETE	Use this field to mark whether tasks are complete or ongoing.

Using the Spreadsheet

Filtering and Sorting

Use the Sort & Filter function to adjust the viewable cells or change the order in which they appear.

SORT (Y/N)	DATE	DURATION (DAYS)	PRIMARY PROCES	SUB-PROCES	TASK	NOTES	RESPONSIBLE UNIT	DEPENDENCIES & PARTNERS	TASK COMPLETE	Month
-	11/15/2021	14	Management	None	Review and approve written procedures for all Candidates Services		Candidate Services	Executive	no	Nov
-	11/15/2021	14	Management	None	Review and approve written procedures for all Election Task and Mail Ballot Processing processes		Election Technology and Mail Ballot Processing	Executive	no	Nov
-	11/15/2021	14	Management	None	Review and approve written procedures for all Election Task (processes listed in table)		Election Task	Executive	no	Nov
-	11/15/2021	14	Management	None	Review and approve written procedures for all Election Task (processes listed in table)		Election Task	Executive	no	Nov
-	11/15/2021	14	Management	None	Review and approve written procedures for all Election Task (processes listed in table)		Election Task	Executive	no	Nov
-	11/15/2021	10	Management and Data Services	Ballot Preparation	Review and update mail ballot procedures		Candidate Services	County CIO	no	Nov
-	11/15/2021	9	Management	Security Plan	Meet with City IT to create a security plan for an election software book (includes hardware, power cables, test, backup, etc.)		County CIO	City IT	no	Nov
-	11/15/2021	14	Management	External Support	Meet with the contractor to discuss the election software and discuss the needs (including user access, data, and reporting)		County CIO	City IT	no	Nov
-	11/15/2021	21	Management and Data Services	Ballot Preparation	Testing of mail ballot procedures		Candidate Services	Candidate Services	no	Nov
-	11/17/2022	9	Management	Security Plan	Review and update mail ballot procedures		Election Technology and Mail Ballot Processing	Executive	no	Nov

This function allows the user to change the view so that only the tasks one unit is responsible for appears. While the executive may keep a master list of tasks, unit supervisors can be provided with an exported list that only includes the tasks for which they are responsible.

Importing into other productivity tools and applications

Web-based software services like Airtable, Asana, Monday.com, Jira, or other project management tools, are useful to organizations that require collaboration across multiple departments and processes. Both provide tools to upload existing sheets to create projects in the application.

Sharing

The calendar can be easily shared as an editable Excel file, Google Sheets, or PDF.

Making Changes

Election and Election Date

For every election, change the **Election** (A2) and **Election Date** (C3) to the name and date of the election on which the project calendar is focused.

Task Start and Completion Dates

The start and completion dates (columns C and D) are automatically calculated using formulas. If you simply make a copy of an existing spreadsheet and update the Election Date field (C3), all your start and completion dates will automatically update.

However, if you need to create a new row, or you accidentally delete a formula, here is how to enter the formula correctly.

Option 1. Use the “fill” feature.

1. Highlight the row where you wish to insert an additional row.
2. From the toolbar, click Insert > Rows > Insert 1 row below.
3. Manually enter the +/- Days and Duration.
4. Highlight cells C and D in the row above your new row.
5. Hover your cursor to the bottom right corner of the D cell until the black plus (+) sign appears.
6. Drag your cursor directly down to the same cells in your new row. The correct formulas will automatically populate.

Option 2. Manually type the formulas. For this sample, we will assume you are in row 9.

1. Go to cell C9.
2. Type this formula (without the quotes): “=\$C\$3+A9”
3. Go to cell D9.
4. Type this formula (without the quotes): “=C9+(B9-1)”

Create a formula in each cell of the TASK START DATE column (Column C) to subtract the **Start (+/-)** (Column A) from the **Election Date** (B3) using an absolute cell reference of the **Election Date** (\$B\$3).

Sample Formula

Cell B9: =\$B\$3+ A9 is the same as Cell B9: 5/17/22 - (-180)

Both return an output of 11/18/21

Drop Down Lists

Columns E, F, and L (processes, subprocesses, and completion information) all have drop down menus. Drop down menus can make data entry easier. More important, they can help keep you organized by restricting what values can be entered into a

field.

For example, the Responsible Unit column restricts the input to one of seven units: Executive, Election Technology, Mail Ballot Processing, In-Person Voting Operations, Election Workers, Candidate Services, Data Services, and Voter Services.

You can customize your drop-down menus using the “data validation” feature.

Data Validation in Excel

To update a drop down menu in Excel, follow these steps. Note that the contents for your drop down list (the choices you want to appear in the drop down) are listed in a second worksheet in the same Excel file.

1. Locate the worksheet where the drop down choices are listed. Edit your list.
2. Locate the worksheet and column with the cells containing a drop down menu. Highlight the cell (or cells in the same column) you wish to update.
3. From the toolbar select Data > Data Validation.
4. In the Data Validation window, select Settings. Set the following parameters.
 - a. Allow: List
 - b. Ignore blank (checked)
 - c. In-cell dropdown (checked)
 - d. In the Source box, select the icon to the left of the box. It looks like a red arrow pointing to a blue box. This will collapse the Data Validation window. Go to the worksheet with the drop down list, and highlight the entire list. Hit Enter. The Data Validation window will enlarge again.
 - e. Hit OK.

Data Validation in Google Sheets

To change a drop down menu in Sheets, follow these steps.

1. Highlight the cell (or cells in the same column) you wish to update.
2. From the toolbar select Data > Data Validation.
3. In the Data Validation window, set the Criteria to “List of Items.”
4. In the field to the right, add or edit the values you would like to appear in your drop down list. Separate each item by a comma.
5. Check the box “Show dropdown list in cell.”
6. Set “On invalid data” to “Reject input.”
7. Leave the “Appearance” box unchecked.
8. Click Save.

