

# Teaming Up to Advance Election Administration Practices: An Implementation Workbook

## How a State and Their Local Jurisdictions Can Work Together to Improve Processes and Procedures

This workbook will help your jurisdictions form collaborative think tanks - work groups that produce excellent election resources. Successful work group programs are carefully planned, organized, and maintained. This workbook will help state and local election officials, or a smaller group of local election officials, coordinate to build one or more work groups that produce outstanding election administration guides, manuals, standard operating procedures, and more. See our [North Carolina HUBS Case Study](#) for an example.



## Can My State Run a Work Group Program? Should It?

Any jurisdiction can benefit from organizing election officials into topic-driven work groups.

Work Groups:

- Encourage fresh ideas and amplify unheard voices among local election officials.
- Enable election administrators to address important and timely election administration issues.
- Promote consistency in processes and uniformity across jurisdictions.
- Establish standards and best practices.
- Reduce duplicate efforts, costs, and inefficiencies.

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## How to use this workbook

Whether you are forming a single work group or many, this guide will walk you through the steps to plan, organize, and maintain a successful work group program.

**01**

### **Plan Your Program**

Identify areas of improvement, recruit program leaders, choose work group subjects, brainstorm project ideas, and develop a program charter.

**02**

### **Organize Work Groups**

Identify specialized members, general members, assign members to subject areas, and prepare for your first group meetings.

**03**

### **Maintain Your Success**

Plan for future meetings, solicit feedback from your work group members, and communicate with stakeholders.

# Step 1 - Plan Your Program

You are building a work group program to improve one or more areas of election administration. Step 1 will help you recruit program leaders, identify areas of improvement for your state or jurisdictions, choose work group topics, brainstorm project ideas, and develop a charter to guide the future of your program.

## ***Exercise 1: Recruit Program Leaders***

Collaborating with other election leaders in your state can help you develop and maintain a successful work group program. The program leaders you recruit should:

- Have the time and dedication to lead a work group.
- Be respected by their peers.
- Have shown commitment to excellence in election administration.
- Will contribute to a collaborative think tank environment.



These program leaders may:

- Lead work groups.
- Schedule work group meetings.
- Help recruit work group members.
- Help steer the direction of your program.
- Help draft a program charter.

**List possible program leaders in the space below:**

■	
■	
■	
■	
■	

**Exercise 2: Identify Areas for Improvement**

Use the questions below to identify areas for improvement that could benefit from work group attention.

- What problems have occurred in prior elections?
- Where can you improve documentation?
- How can you amplify best practices?
- Where can you promote consistency across jurisdictions in your state?
- How can you provide support to under-resourced jurisdictions?
- What subject areas will be most crucial to your success in upcoming elections?



List the issues you identify in the space below:

■	
■	
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■	
■	
■	

### Exercise 3: Choose Work Group Subject Areas

The checklist below will help you and your program leaders brainstorm other areas for improvement. Some of the items are broad areas of election administration (like Campaign Finance and Voter Registration), others refer to specific election processes (like Warehousing and Ballot Proofing), and others refer to departments or operations (like IT Systems and Communications and Outreach). Choose the subject areas that best fit the needs of your jurisdiction(s). We recommend limiting each work group to one subject.

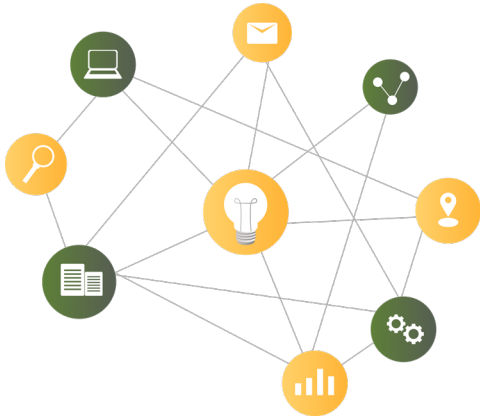
Reference the list you made in Exercise 2 as you choose subject areas from this list.

Use the blank spaces to add any additional areas.

<input checked="" type="checkbox"/> Subject Areas
<input type="checkbox"/> Absentee / mail ballot voting
<input type="checkbox"/> Ballot design
<input type="checkbox"/> Ballot proofing
<input type="checkbox"/> Budgeting
<input type="checkbox"/> Business / IT Systems
<input type="checkbox"/> Campaign finance
<input type="checkbox"/> Candidate petitions
<input type="checkbox"/> Canvassing and certification of results
<input type="checkbox"/> Communications and outreach
<input type="checkbox"/> COOP / emergency and contingency planning
<input type="checkbox"/> Continuing education for election officials
<input type="checkbox"/> Contracts and requests for proposals
<input type="checkbox"/> Forms / Design
<input type="checkbox"/> Election boards
<input type="checkbox"/> In person voting
<input type="checkbox"/> Initiatives and referenda
<input type="checkbox"/> Leadership
<input type="checkbox"/> Lean / Six Sigma
<input type="checkbox"/> Legislation and compliance
<input type="checkbox"/> List maintenance / NVRA compliance

<input checked="" type="checkbox"/> Subject Areas
<input type="checkbox"/> Mapping and districts
<input type="checkbox"/> Military and overseas voting
<input type="checkbox"/> Office management
<input type="checkbox"/> Poll workers
<input type="checkbox"/> Polling Locations
<input type="checkbox"/> Recounts
<input type="checkbox"/> Security
<input type="checkbox"/> Standard operating procedures
<input type="checkbox"/> Voter registration
<input type="checkbox"/> Voting systems (general)
<input type="checkbox"/> Voting systems (vendor specific)
<input type="checkbox"/> Warehousing
<input type="checkbox"/>
<input type="checkbox"/>
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**Exercise 4: Brainstorm Project Ideas**



You just identified the subjects your work groups will focus on. Now, you should consider specific projects within that subject area.

Program leaders should brainstorm project ideas early to guide your future work groups. This activity can also help you determine which projects are most important, how many work groups to organize, and how many members to assign to each work group based on workload.

Focus on products that will improve your state’s or jurisdiction’s operations. These might include standard operating procedures, manuals, forms, communications materials, or website content.

List project ideas in the table below:

Work Group Subject	Project Idea 1	Project Idea 2
<i>Example: Ballot Proofing</i>	<i>Ballot Proofing Checklist</i>	<i>Form letters to candidates and participating districts to proof and approve</i>
<i>Example: Standard Operating Procedures</i>	<i>Election Procedures Manual</i>	<i>Standardized forms</i>

## **Exercise 5: Develop a Charter**

Your charter will define the goals and scope of your program.

Use the space below to brainstorm ideas for your charter.

### **Charter Details**

**What is our mission? This is your elevator pitch focusing on cause, actions and impact.**

Cause: What is our cause? Who do we serve? What matters? Who is important?

Action: What are we doing?

Result: What change do we want to see?

### **Program Leadership**

**Who is eligible to lead a work group?**

**Moving forward, how are program leaders selected?**

**How long is each program leader expected to serve in that position?**

**Membership**

Do members volunteer?

Are they assigned?

Can they be in more than one working group?

**Meetings Schedule**

What is the meeting cadence?

How is the agenda set?



## Communications Schedule

How often should you send program updates to work group members? Local election officials?

Should you share information about your program or project with other members of the elections community?

Who? (e.g. voting advocacy groups or the media)

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How often? (e.g. when projects are complete)

## You may also want to use your charter to establish:

Term limits for members

Quorum rules

An attendance policy

A process for decision making (e.g. majority rule)

# Step 2 - Organize Work Groups

The members of these groups will make the guides, forms, and other materials that improve election administration in your state. If you plan to form only one work group, then your program leaders may also be the work group.

**As you complete step 2, try to develop work groups with members from jurisdictions that are:**

- Large
- Small
- Urban
- Suburban
- Rural
- Well-resourced
- Under-resourced
- Geographically diverse
- Politically diverse
- Racially and culturally diverse



This will help your groups develop resources that are useful for all jurisdictions within your state.

## ***Exercise 1: Identify Group Members***

Start by asking for volunteers. Briefly explain your program’s mission, goals, and group subject areas to election officials you think may be interested.

Ask volunteers to identify any and all groups they would be interested in joining, and set a deadline for responses. If you do not receive enough volunteers, reach out to election officials whom you trust, and ask what groups they would be interested in joining. Seek out staff members as well as supervisors to ensure a wide range of ideas and experiences. You can record potential members and their preferred subject areas in the table below.

*This can be done easily using free tools such as Survey Monkey and Google Forms*

Potential Member	Subject Area Preference 1	Subject Area Preference 2	Subject Area Preference 2

**Exercise 2: Identify Specialized Members**

In many cases, groups will benefit from members with specialized skills. For example, a communications expert will help groups evaluating communications heavy subjects, like voter registration or crisis management. An attorney may be helpful if the group determines that legislation is required.

**Use the space below to list individuals in your organization who have special skills. These members may serve on more than one work group.**

	Legal	Special Projects	Communications	Training and Outreach	Security Services and Technology
<i>Example: Member A</i>	✓			✓	

**Exercise 3: Assign Members to Subject Areas**

If your program has more than one work group, then you will need to decide how to assign members to groups. There are several ways that you can assign work group members. Perhaps in your jurisdiction, it is sufficient to ask for volunteers for each subject area. If you have more volunteers than a work group can accommodate, consider selecting members by:

- Random draw
- First to volunteer
- Subject matter experience/expertise
- Endeavor to create balanced membership on your work groups that represent differing:
  - Geographic diversity (including population and size)
  - Political diversity
  - Availability of resources
  - Levels of supervisory responsibility or experience
- Holding a draft (see our [North Carolina HUBS Case Study](#) for an example)

Setting member term limits in your charter can ensure that enthusiastic volunteers have opportunities to participate in work groups, even if they are not selected initially.

### Exercise 4: Prepare for your First Group Meetings

Now, each program leader should prepare for their first group meeting. The exercise below will help program leaders draft their first meeting agenda. The language used below is a suggestion and groups should develop the language and parameters that work best for them.

#### I. Introduction

##### A. Set expectations

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##### B. Highlight key points of charter

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##### C. Establish positive tone

#### II. Establish Procedure

##### A. Discuss logistics

1. This group will meet on \_\_\_\_\_  
e.g. the 2nd Tuesday of every month from 2:00 to 4:00

2. Group members should attend every meeting. If you must miss a meeting then \_\_\_\_\_  
e.g. send a staff members in your place for that meeting

3. The program leader will send an agenda and materials for the group to review by \_\_\_\_\_  
e.g. the day, 48 hours before each meeting.

4. Our group will house drafts of projects on \_\_\_\_\_  
e.g. Google Drive, with a link to the drive

##### B. Discuss group goals

1. Members are excited about this group, because \_\_\_\_\_  
 \_\_\_\_\_

2. This group will be successful if \_\_\_\_\_  
 \_\_\_\_\_

3. Our projects should \_\_\_\_\_  
e.g. improve efficiency, promote consistency across jurisdictions, any other ideas from your members

### III. Brainstorm Project Ideas as a Group

A. Discuss project ideas, including any relevant ideas that you developed in Step 1, Exercise 4.

Ask each member of the group to share as many ideas as possible and record them in the space below:

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B. Using the project ideas identified during the initial brainstorming in Step 1, allow the group to generate other possible projects.

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C. Ask each member of the group to share as many ideas as possible using sticky notes for in person meetings or in-app whiteboards for video conferencing. Record those ideas in the spaces below:

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D. Group common themes or allow group members to vote to narrow ideas down to 2-3 possible projects.

**IV. Project Development Activity**

A. Conduct the activity in Appendix A to map the landscape for one or both of your chosen projects.

**V. Establish Project Structure**

A. Project

1. The first task for this project is to draft \_\_\_\_\_

2. \_\_\_\_\_ is responsible for the first draft of this product.

3. They will receive help from \_\_\_\_\_

4. A first draft should be completed on \_\_\_\_\_

5. Include other important milestones, check-in dates, or comments: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**VI. Next Steps**

A. Our next meeting will be on \_\_\_\_\_

B. Other notes and reminders include: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. \_\_\_\_\_ will prepare meeting minutes and send them to group members by \_\_\_\_\_ time after meetings.

## Step 3 - Maintain Your Success

### **Exercise 1: Plan for Future Meetings**

After your first meeting, your groups will deep-dive into their work. The checklist below can help program leaders organize subsequent meetings.

#### Meeting Checklist

- Review work done since the last meeting.
- Provide feedback to group members.
- Assign tasks to be completed for the next meeting.
- Consider whether the project is on schedule.
- Add items that are outside of scope for the current project to a list for future meetings.

**Additionally, ask members the following questions at least once every few meetings:**

What is working?

What is not working?

Is our work so far consistent with the program charter and mission statement?

Does the group need to adjust project or task deadlines, assignments, etc?

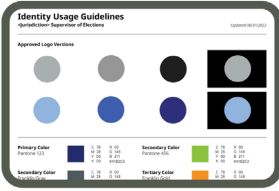
Are there other changes that can help the group succeed?

Teams will vary widely in what problems they tackle and how they tackle them. These tips will help you generate new projects:

**01** Memorialize best practices from excellent staff in the form of a Standard Operating Procedure or SOP. An SOP can be as simple as a checklist that any employee should go through when performing an election process.


**02** Consider important subtopics that would benefit from guides or manuals. The Elections Group’s [“Resources for Election Officials”](#) webpage has several guides that might serve as inspiration. The page includes [A Guide to Ballot Replication](#), [7 Strategies for Enhancing Ballot Drop Box Security](#), and a [Logic and Accuracy Testing](#) guide.

**03** For many topics, communication is paramount. The Elections Group’s [Communications Resource Desk](#) can help your groups develop excellent communications materials. Review our [Communications Plans](#), use our resources like [Writing an Election Facts Webpage](#), or [request assistance for your jurisdiction](#) at low cost or free of charge.



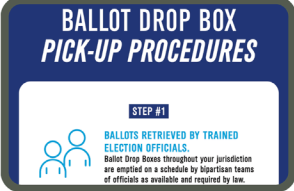
**Developing Your Brand Identity**

Create a brand identity for your jurisdiction by using consistent elements – logos, fonts and color palettes. Maintaining a consistent brand identity is important to establishing your jurisdiction as a trusted source of information.



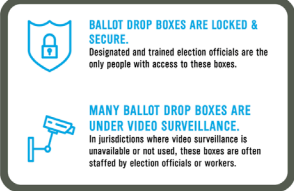
**Ballot Sorter Signs**

Creating signs illustrate the sorting procedures for ballot sorters.




**Ballot Drop Box Pick-up Procedure Posters**

Creating posters and handouts that illustrate the security measures and procedure surrounding Ballot Drop Box Pick-up Procedures can be helpful assistive tools.




**Ballot Drop Box Security Posters**

Creating posters and handouts that illustrate the security measures and procedures for ballot drop boxes.




**Mail Ballot Processing Posters**

Conspicuous posters in mail ballot processing rooms or facilities are a helpful tool. They allow observers to follow the process as it happens, and coupling posters with handouts that provide descriptions of each process is an effective way to provide additional clarity to observers.




**Schedule of Events for an Election**

Providing a schedule of important events for an election is an easy way to make sure that members of the public and media are updated on what goes into administering an election.



**Mail Ballot Processing: Posters and Handouts**

Creating posters and handouts that illustrate the steps of mail ballot processing is a simple way to make sure that observers are aware of each step of the process and can follow along in person as they take place.



**Writing Effective Elections Press Releases**

Writing effective press releases is key to making sure that journalists and news organizations share the information that your office needs voters to be aware of.

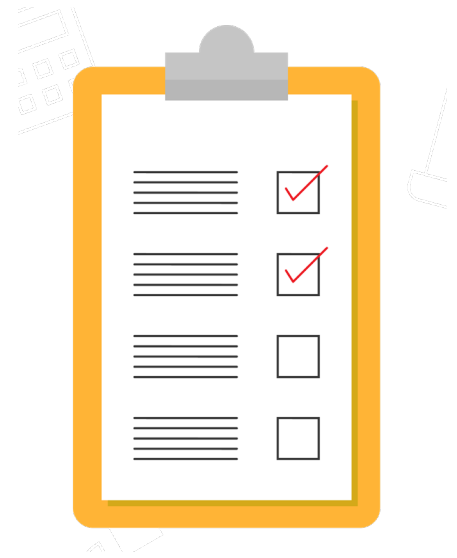


**Exercise 2: Solicit Feedback and Perform Evaluations**

You should regularly solicit feedback from your work groups and perform evaluations of your program.

An excellent way to solicit feedback is by developing a survey for program leaders and work group members. Anonymous surveys are likely to yield honest and complete answers. Consider using the example questions below:

- What aspect of the group needs improvement?
- What is working for the group?
- What is not working for the group?
- How often does the group meet?
- What is the average attendance of meetings?
- Complete this statement: I think the group should meet
  - More frequently
  - Less frequently
  - The current frequency
- When is the meeting agenda shared with the group?
  - More than 3 days before meeting
  - Less than 3 days before meeting
  - During meeting; no agenda used
- Which best describes the group’s projects/tasks?
  - Group has completed one or more projects to date
  - Group has one or more tasks in progress
  - Group has one or more projects that will begin within next month
  - Group does not have projects/tasks
  - The group has not had a meeting to date
- Any other comments or suggestions?



You or a program leader should evaluate the responses to your survey and promptly make any beneficial changes to your groups. Further, candidly share the information you learned with members of the work group program, though avoid disclosing information that could compromise any member’s anonymity.

### Exercise 3: Communicate with Stakeholders

Your work groups may have stakeholders that are not participants in the steering committee or the work groups themselves. For example, if your work group is comprised of election officials from the state and some representative counties, you will likely consider the other county election officials to be stakeholders in this work. Likewise, if your work group is a localized part of your state, you may want to bring in other counties or the state at various points in your project.



Email stakeholders regular updates about the products coming from your work groups. This encourages stakeholders to use those products and may attract volunteers for future work groups. Ensure that your emails include the following checklist items:

- | ✓ Question  |
|---|
| <input type="checkbox"/> A description of any new products from work groups                             |
| <input type="checkbox"/> A link to the web location where the product is stored                         |
| <input type="checkbox"/> A brief explanation of when and how to use new products                        |
| <input type="checkbox"/> A statement of gratitude to the group or groups who developed the product(s)   |
| <input type="checkbox"/> Information about how to volunteer for future groups                           |
| <input type="checkbox"/> A point of contact for additional information about the product or work groups |

*If your jurisdiction is in need of additional resources for election officials, please contact [The Elections Group](#). We produce and provide guidance for election offices at low cost or no cost.*



**Exercise 3: Share your findings**

Other jurisdictions in your state or throughout the nation may benefit from learning about your experiences. Actively look for opportunities to share your findings. These may include:

Prepare a short presentation for your local governing board, state association of election officials, or even a national conference.

Now that you are savvy working with regional media, produce a local interest story on your group's efforts and successes.

Produce a short video to broadcast on social media.

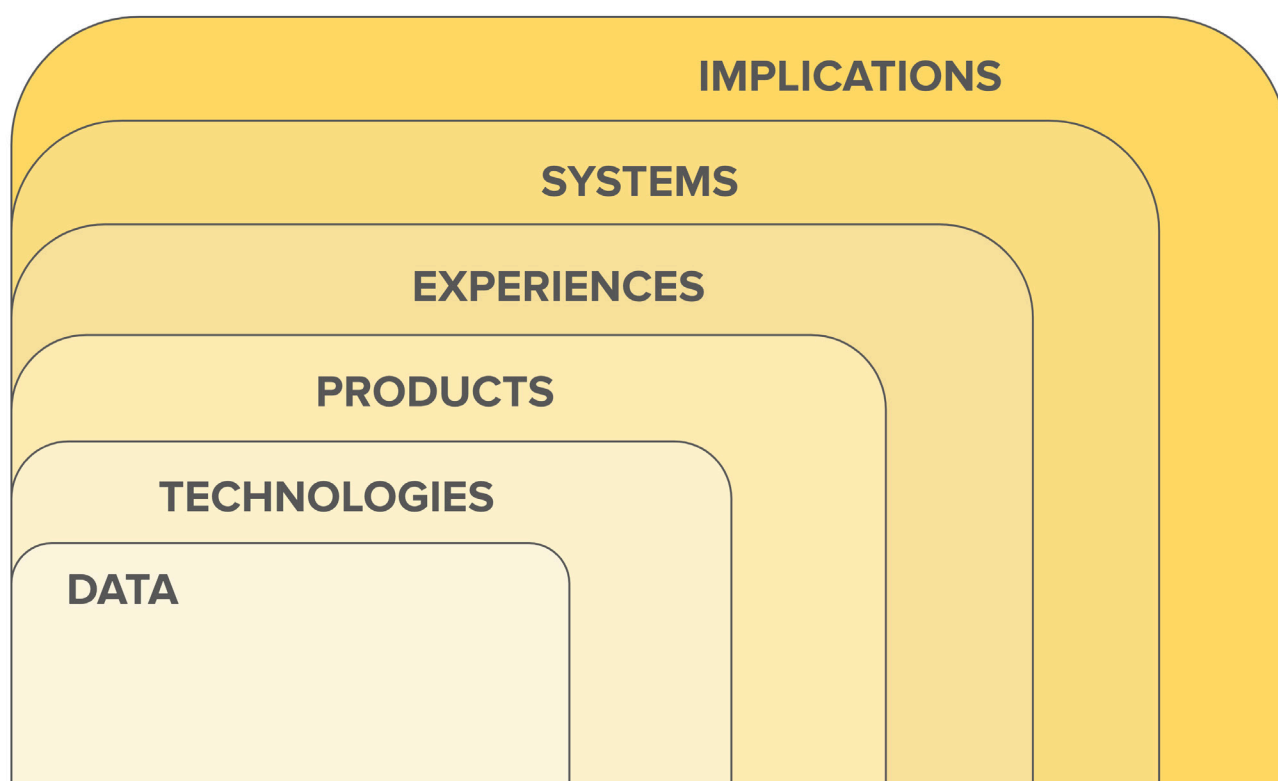
Create a short report to publish on your website and distribute through your professional network.

## Appendix A

### Mapping the Whole Landscape

This is a brainstorming activity to help your working group consider the whole landscape for a proposed project. It can be done together as a group or worked on individually using a shared document or virtual whiteboard application.

Using the image below as your guide, draw a large-scale version of it on a big piece of paper or on a white board (real or virtual). Write a description of the proposed project at the top.



1. Prompted by the word in each layer of the map, members use sticky notes (real or virtual) to write down as many examples as they can for each layer, posting the sticky notes directly on the map as they go.
2. Members can start in any layer and add ideas to the layers in any sequence they want.
3. Ideas might include things that happened in the past, the present, or things that might happen in the near future, all of these are fine.
4. Encourage members to respond to each layer so that no category is left blank.

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## Map Key

- **Implications** (positive, negative, intended, unintended, predicted, unexpected)
  - What changes do you see happening as a result of this project?
  
- **Systems**
  - What systems are connected to this project?
  - What systems make the things in the other layers possible?
  - What problems might be related to these systems?
  
- **Experiences** (events, spaces, moments, feelings)
  - What are some of the known problems with the current experiences?
  - What are some hypothetical opportunities?
  
- **Products** (digital, physical, form, function)
  - What physical or digital products are part of the current experiences?
  
- **Technologies** (emerging, essential, standalone, integrated)
  - What technologies are currently used in the landscape of this project?
  - What's needed?
  - What's missing?
  
- **Data** (sources, big data, qualitative data)
  - What types of data might be available that are related to your project?

Once the group has populated the map you can frame the proposed project and consider the implications. Consider these questions as discussion prompts:

- What intrigues or inspires you?
  
- What are non-traditional ways to approach this project?
  
- What more do you need to learn to move forward with this project?
  
- What would have to be true in a different layer to make this project more successful?
  
- What implications are happening or could happen that concern you most? Excite you the most?