

Recipe for Success: How to Write and Maintain Effective Standard Operating Procedures (SOPs)



The
Elections
Group



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Purpose of this guide

Election administration is complex. Nearly every election operation depends on several staff members completing multiple tasks. Regardless of the staff size, there are many processes that must be completed in a specific manner to ensure consistency, accuracy and efficiency. Further, many offices rely on new and temporary employees at critical times such as just before an election, when training time and onboarding resources are limited.

Similar to the election worker manuals built to support administration of the voting process, standard operating procedures (SOPs) aid election office staff in the administration of every process in preparing for and conducting an election. This guide aims to assist election officials in developing strong and sustainable SOPs to ensure success, election after election. Whether relying on new staff or transitioning to a new leader, high-quality SOPs serve as the foundation for successful administration and accountability in the future.

Introduction

Effective SOPs provide a foundation for most of the procedures you engage in before, during and after an election. They allow you to achieve a consistent work product as well as identify the parts of processes that are working well or need improvement. SOPs enable the creation of a program that is strategic, repeatable and flexible.

Well-crafted SOPs memorialize and make processes that staff may perform from muscle memory repeatable. Work done from memory can lead to the organization having a “single point of failure.” An organization reduces its risk and enables operational consistency when practices are documented and based on the refined knowledge of the organization, rather than any one individual.

In addition to minimizing “single points of failure” or other “knowledge transfer” risks, SOPs have a significant communication benefit. They can help explain complex tasks and demonstrate to the public that strict protocols are followed to ensure the accuracy of every election.

Think of your SOPs as a recipe for success. You need the right ingredients, in the correct proportions, added to the recipe in the proper order, so the product comes out the same every time. Writing and maintaining effective SOPs leads to strategic success, paving the way for predictable and consistent outcomes.

STEPS TO DEVELOPING EFFECTIVE SOPS

SOPs will define the **who, what, when, where** and **why** of a process. To develop well-written SOPs, you need to observe and map each process in real time, as it occurs. Ideally, this means developing SOPs during slower elections to ensure ample time for completion. The steps to develop an SOP, outlined below, include:

- 1.** Identify and prioritize processes
- 2.** Identify key personnel
- 3.** Set up for success
- 4.** Map the process
- 5.** Draft and test the procedures
- 6.** Publish and revise

When creating your SOPs, start by checking if the state or another office has manuals or resources that document similar procedures. These can give you a starting point.

Before proceeding, it is important to define the difference between process and procedure.

- **“Process”** describes a series of steps taken to achieve a particular goal.
- **“Procedure”** describes the established, official way of performing a process.

Your SOPs will transform certain processes performed in your office into procedures: detailed, specific assignments and workflows that represent the official way that your office achieves its goals.



STEP 1: IDENTIFY AND PRIORITIZE PROCESSES

The first step in developing SOPs is to determine which processes to document. Give priority to items with the **highest risks** if deviation occurs such as **logic and accuracy testing**. Priority should also be placed on those processes performed by temporary and part-time workers as well as those with a current single point of failure.

Risk assessment matrix

		Likelihood				
		Very unlikely to happen	Unlikely to happen	Possibly could happen	Likely to happen	Very likely to happen
Impact	Catastrophic consequences	Moderate	Moderate	High	Critical	Critical
	Significant consequences	Low	Moderate	Moderate	High	Critical
	Moderate consequences	Low	Moderate	Moderate	Moderate	High
	Low consequences	Very Low	Low	Moderate	Moderate	Moderate
	Negligible consequences	Very Low	Very Low	Low	Low	Moderate

Not sure about identifying your high-risk processes? Use a risk impact / probability chart [like this one](#) to help you prioritize.

Make a list of all the election-related processes conducted in your office. Examples include, but are not limited to:

1. Distributing election equipment and supplies
 - a. Voting equipment
 - b. E-pollbooks
 - c. Packaging supplies
 - d. Shipping, delivery and returning
2. **Ballot production and proofing**
3. Preparing election date-specific products for production
 - a. Envelopes and forms
 - b. Signs and posters
4. Time-sensitive compliance efforts
 - a. Filings
 - b. Certifications
 - c. Notices and publications

5. Election Day
 - a. Election Day command center
 - b. Election night return
6. Security (physical, IT, cyber, continuity of operations planning)
7. Processes and software requiring testing routines prior to use
 - a. Logic and accuracy
 - b. Public information websites
 - c. Election night reporting
 - d. Call tracking software
 - e. Phone hunt groups for Election Day
8. Voter registration data entry
 - a. Voter registration
 - b. Quality control routines
 - c. Mail ballot application processing
9. Voter assistance
 - a. In-person
 - b. Phone calls
 - c. Emails

STEP 2: IDENTIFY KEY PERSONNEL

Once you have identified and prioritized the processes for documentation, determine the individuals who should be involved. To capture it fully, all team members engaged in a process should play an active role in developing the SOP. This promotes buy-in from the SOP's eventual users and increases familiarity with other related tasks. Below are the individuals who should be involved and a brief description of their roles.

Knowledge Workers

Knowledge workers are staff members responsible for completing the processes identified for documentation. They generally hold the institutional knowledge, often in their heads or with personal checklists and

notes. Documenting their practices is essential in drafting the current state of the process and a necessary precursor to developing SOPs and optimizing any process.

Documenters/Extractors

Documenters are responsible for recording every step of a process and drafting the SOP. It can be beneficial to have documenters without any familiarity with the process. Their unfamiliarity will allow them to ask questions, identify confusing shorthand — things that are intuitive to the knowledge workers, but not to those unfamiliar with the process. Another option is to have documenters who have previously served in the role being documented as their understanding of the process will help to flag areas that may be missing steps.

Testers

Testers simulate a task based on the information extracted or documented from knowledge workers. Testers review each step of an SOP to identify confusing or ineffective areas. While testers should not be the primary knowledge worker of the process being documented, primary workers should observe the tester, stepping in when there are questions or gaps in execution.

Leadership

Leadership, including supervisors and managers, plays a crucial role in prioritizing and overseeing the development of SOPs. They should ensure timely completion, review drafts for legal compliance and provide executive oversight throughout the process. Leadership is responsible for the final approval of the SOPs.

Others

In some cases, such as logic and accuracy testing or mail ballot production SOPs, it may be necessary to bring in representatives from vendors or other business partners. They can offer an outside perspective and potentially provide information about what their role is after certain processes are handed over to them for completion.

While collaborating with others can be useful, a well-crafted SOP can empower a local office to feel more confident in handling key tasks that they may typically rely on external parties to complete.

At a minimum, documenters should have access to guides and instruction manuals for review.

STEP 3: SET UP FOR SUCCESS

Now that you have prioritized the processes to document and designated key personnel, the next step is to set everyone up for success.

Determining purpose, scope and desired outcome

For each process you want to document in an SOP, you need to determine the purpose, scope and desired outcome expected from the SOP. For example, if the process identified is ballot proofing, then it is important to define what the purpose of ballot proofing is, what tasks should be documented in the SOP and what is considered “success”.

Defining the **purpose** of the work is important to clearly outline its objectives. What problem(s) is the SOP trying to solve? In the example of ballot proofing, the purpose might be ensuring offices and issues appear correctly on the ballot.

The **scope** of the SOP defines its use and applicability. It determines where and how it will be used. The SOP should be limited to and focused on the specific process being completed. For example, including the candidate filing process in the ballot proofing SOP would be out of scope. Similarly, do not include the delivery of the final proof to the printer.

Part of determining the scope is considering **roles and responsibilities**. It is important to outline who performs the tasks and who to contact if problems arise. You will also want to define the person/ position responsible for implementing, reviewing and updating the SOP.

Finally, it is necessary to determine the **desired outcome** the SOP aims to achieve. As mentioned above, what does “success” look like? For instance, an obvious desired outcome of ballot proofing is 100% accuracy in the ballot’s final draft, but less obvious could be reducing the time frame between candidate qualification and final delivery of the ballot to the printer.

Determine best method for capturing the processes

It is important to document the processes in multiple ways to ensure a 360-degree view. The documenter should first collect any existing documentation, such as forms, manuals, informal notes and checklists. It is also advantageous to document either through pictures, audio or video recording, depending on the process being completed. If the process is walking a caller through a task, an audio recording might be useful, but if the process includes physical tasks such as ballot proofing, then a video recording may be beneficial. Recording with different mediums provides the documenter with a record to return to without constantly referring back to the knowledge worker.

Initial meeting

The best way to prepare staff and others for the development of an SOP is to hold a meeting to clarify goals, identify steps to completion and establish a timeline. This session provides a platform to discuss roles, time commitments and other resources. It is an opportunity for the team to bring up matters that were not considered previously.

What will you need?

The materials needed will vary depending on the processes being documented, but generally speaking you will need:

- Whiteboard and dry erase markers
 - To brainstorm all of the organization’s processes, group them and draft intuitive titles
 - To outline known processes
- Equipment
 - Computers
 - Sample voting equipment (e.g., e-pollbook, kits, forms, etc.) and access to various applications
- Recording Equipment
 - Depending on the process, you may want a way to take pictures or record video or audio of the process being carried out
- People (see list of personnel above)
- Existing manuals, instructions, notes and current election statutes and regulations, etc.

STEP 4: MAP THE PROCESS

With your processes and key personnel identified; purpose, scope and outcomes defined; and initial meeting held, you’re ready to begin mapping the process. The following are the steps necessary to ensure the process is fully documented from beginning to completion.

Interview

After the initial meeting, documenters should interview all knowledge workers performing the process. The goal of the interview is to verbally capture the knowledge workers’ understanding of the process and how they complete it from start to finish. You may want to record the interview for future reference.

Sample interview questions:

- Why is this process important?
- When is it typically conducted?
- What is the ultimate result of the process?
- What are the materials required to complete the process?
- Please take me through the process step by step.
- How do you determine if the process has been completed accurately/without error?
- What does successful completion of this process look like?

It may be helpful to share the interview questions with the interviewee before you meet. This allows them to prepare and makes the most effective use of time.

At this point, the documenters should be able to develop a high-level outline for completing the process. This outline should break down the process into major steps or phases, highlighting the key activities or milestones along the way without diving into detailed instructions. For example:

Onboarding a New Employee

Step 1: Pre-Onboarding Preparation

- Notify relevant departments of the new hire's start date and role
- Prepare necessary paperwork
- Set up equipment and access to necessary tools and systems

Step 2: Welcome and Orientation

- Conduct orientation session to introduce the company culture and organizational structure
- Review company policies, procedures, and employee benefits
- Provide a tour of the workplace

Step 3: Training and Development

- Develop a training plan tailored to the new employee's role and responsibilities

Documenters should also begin to consider whether the process, as described by the knowledge workers, can be documented as a step-by-step or if it requires a hierarchical procedure or flowchart (these will be discussed in detail later).

Observe

After conducting the interview, the documenter should observe the knowledge workers responsible for the process actually performing the process from start to finish. The documenter should refer to their notes and outline from the interview to fill in gaps, make corrections or add details. During this time, the documenter may ask more probing questions, such as:

- What forms do you use?
- Where are the forms located?
- Does someone else need to approve or review this work?
- Where are the supplies located?

In some instances audio, video or screen recordings may be helpful to document a process. In these cases, remember to avoid including any segments that may involve sensitive or personally identifiable information (PII).

As part of this process, the documenter may want to take photographs to create a visual map.

Refine and repeat

After observing the process once and asking additional questions, the documenter should refine their outline. They should then observe the process from start to finish again with the refined outline, checking for missing information or deviations from the process. The documenter may seek clarification or additional details from the knowledge worker if needed.

For some processes, another critical aspect to documenting the performance of the process is to observe multiple instances to account

for exceptions and variations that may arise. Observing across multiple days may be necessary to gain a comprehensive view of the process.

Conduct

Finally, assuming the role of the knowledge worker, the documenter walks through the process and explains each step to the knowledge worker using the outline they've created. At each step, the documenter provides the knowledge worker with the opportunity to provide feedback. This is an ideal moment to ensure exceptions, instances of deviations from the current process or any areas of ambiguity regarding the required actions are clearly understood and documented.

STEP 5: DRAFT AND TEST THE PROCEDURES

Having finished the previous steps, the documenter will begin drafting the full SOP. We recommend a phased drafting approach to allow for feedback and collaboration from the initial draft to the final version. Documenters should verify sections of the draft with knowledge workers to ensure they clearly understood the basics of the process. Where applicable, they should also make note of key election statutes or regulations that may be relevant to each section being drafted.

For SOPs that incorporate multiple processes, briefly explain each process section. This clarifies the purpose and ensures that the document flows logically from one process to the next. By stating the purpose, you help users understand how each process fits into the broader procedure, transforming the SOP from a list of instructions to a coherent guide. To aid in drafting, we have an [SOP template and checklist](#) that can help structure the document and ensure key elements are included.

As mentioned earlier, an important step for the documenter is determining the best model for illustrating the process within the SOP. Below, we discuss different models and which one, depending

on the given process, may be most appropriate to include in your documentation. You may find your particular document could benefit from aspects of all three methods.

Step-by-step procedures

The step-by-step procedures are usually the first piece completed when creating documentation of the process from start to finish.

If the process has no variations or exceptions, this may be all that is needed. For example, documenting a process, such as setting up a polling place or programming a voting card, are likely straightforward, step-by-step procedures.

However, if the process involves multiple steps or complex decision-making, or may include deviation, hierarchical step-by-step instructions may be more suitable. In both instances, consider documenting these procedures using a checklist.

For example, a step-by-step format will proceed as follows:

- Step 1. Login
- Step 2. Enter name and address from the application
- Step 3. Complete entering all other fields
- Step 4. File application in the card file

A hierarchical format will proceed this way:

- Access login screen via home page
 - Log in by clicking the green "Admin" button
 - Enter username in field 1
 - Enter password in field 2
 - Enter information from the application
 - Enter first name
 - Enter last name
 - Enter suffix (if applicable)
 - Enter address (include city, state, zip +4)
 - Check to make sure address matches USPS standard

Flowchart

When the process creates one or more if/then scenarios, a flowchart can serve as a helpful visual guide for the knowledge worker. For example, a knowledge worker processing voter registration applications enters the name, date of birth and last 4 digits of the Social Security number on the voter application and then performs a search of the database to determine if the applicant is already registered. The search results could potentially take the knowledge worker through different scenarios:

- No match found and they continue to enter the applicant as a new voter
- Match found, and the voter is already registered at the same address provided on the application (duplicate)
- The voter is registered, but not at the address on the application
- The voter is/is not registered, but is otherwise noted in the database as being ineligible for registration

In this case, a flowchart provides a helpful visual representation of the steps required for each of these likely scenarios.

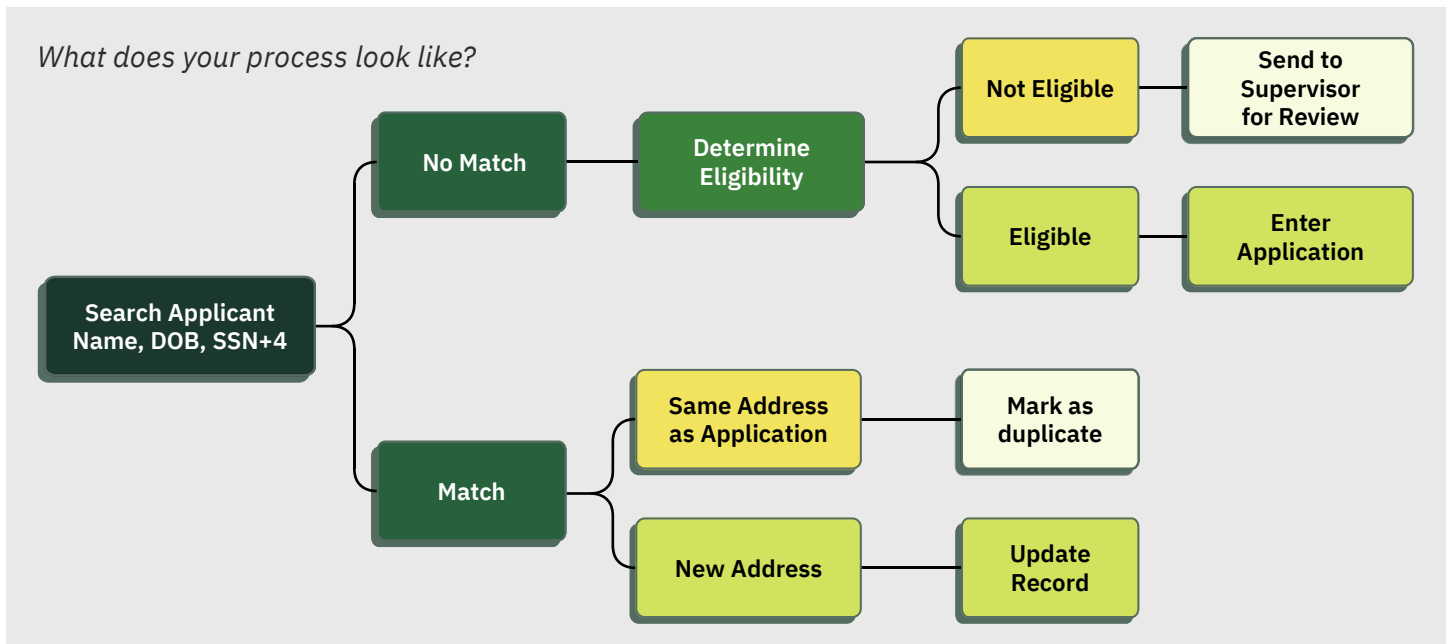
Formatting and language

As you draft the SOP, keep formatting and language choices in mind. Whenever possible, incorporate numbered lists or checklists to articulate actions in sequential order. Additionally, because the content should work for any member of your staff, aim to use plain language in your explanations. Ensure terminology is clear by including a brief definitions section or glossary of key terms, and spell out all abbreviations and acronyms wherever they are first introduced within the text.

Test the SOP

Testing an SOP before finalizing is imperative to ensure its effectiveness and reliability. Following testing, an SOP may be revised. If it is, it is **crucial to test each revision** from start to finish.

The first step in the testing phase is to thoroughly review the drafted SOP to understand the process, steps and desired outcomes. Next, if the process is one that may have different scenarios, identify some of these for testing purposes. Once the scenario or scenarios are defined, assign individuals to complete the test. Knowledge workers should play a role by observing testers but testing should be conducted by those less familiar with the process.



With the test scenarios in place, testers should follow each step outlined in the SOP. Take notes throughout the testing process, documenting observations, outcomes and errors encountered. Encourage testers to provide feedback on their experience, focusing on clarity, completeness and ease of following instructions.

Based on the test results and feedback, modify the SOP as needed, refining the document to ensure it aligns with goals and desired outcomes. This iterative process helps to create a robust and reliable SOP.

STEP 6: PUBLISH AND SET REVISION SCHEDULE

As you finalize SOPs, ensure they are structured in a way that is easy to follow and that will allow for modifications, enabling regular updates and editing.

- Include tables of contents or indexes for quicker information retrieval
- Organize content in sections or chapters and use clear headers to streamline review.
 - Aim to include a section for the purpose of the document (what is the intent) and the scope (who does this apply to/ impact) as well as a section identifying any related documents or references that may be needed to understand the process and their locations
- Use bold, italics or a different font to highlight important points, warnings or notes as this can help draw attention to critical information within the SOP

Remember, “process” describes a series of steps taken to achieve a particular goal and “procedure” describes the established, official way of performing a process.

To ensure clarity and ease of use, SOPs should also have titles that clearly describe the process and its purpose. A consistent numbering system further aids in organizing and categorizing SOPs for quick reference.

- Design simple and intuitive numbering structures and prefixes:
 - Examples: In-Person Voting (INP-XXX); Voting by Mail (VBM-XXX); Election Night Reporting (ENR-XXX)
- Give each SOP a document number
 - Use the word procedure instead of process

Tab	Procedure Number	Procedure Title
1	VBM-001	Ballot Layout and Design
2	VBM-002	Outgoing Ballots
3	VBM-003	Ballot Drop Boxes
4	VBM-004	Incoming Ballots

Once approved by all parties (knowledge workers, leadership, etc.), the SOP should be published.

Revision schedule

Adopting a regular revision and testing schedule is essential. It ensures that your SOPs keep up with changes to laws, policies and regulations that may impact the specific process. Regular revision also allows knowledge workers, who use the procedures regularly, to incorporate feedback or updates to reflect the use of new technologies, equipment or methods.

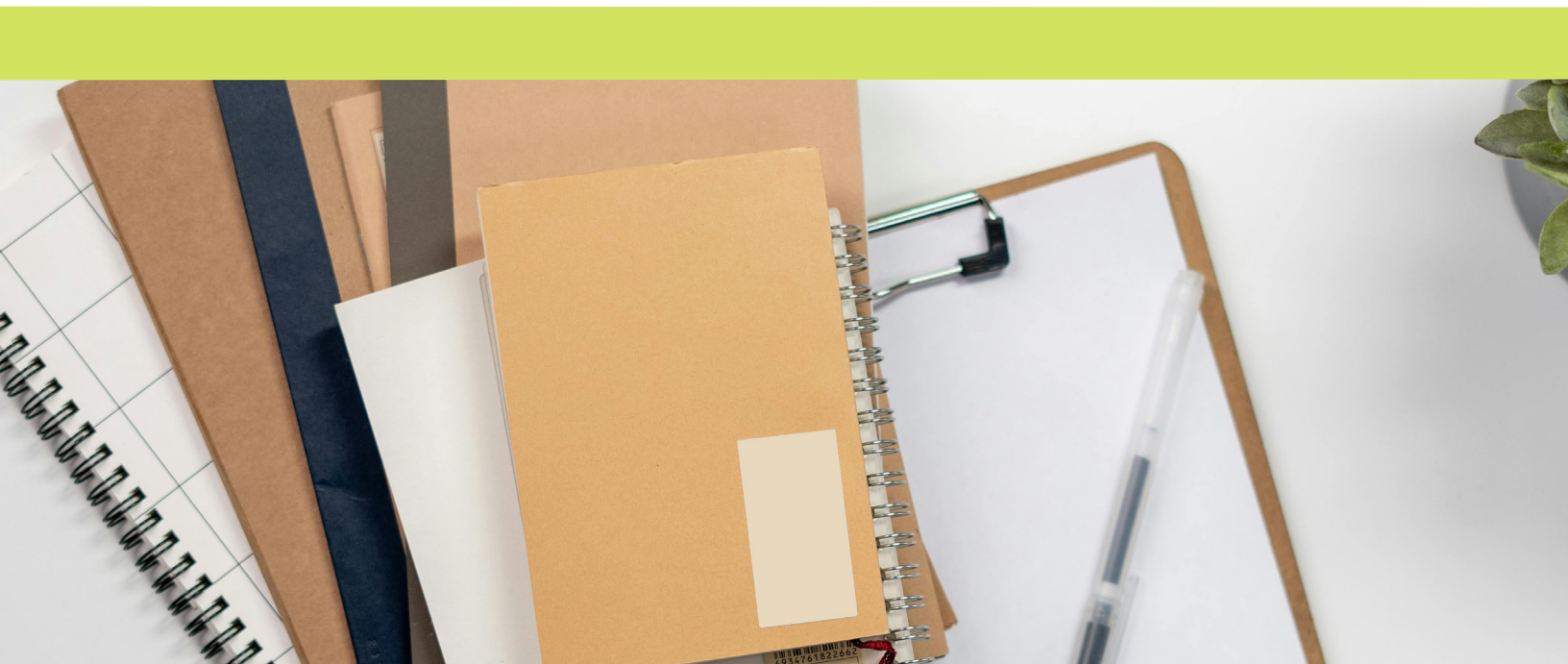
As discussed earlier, you should **designate individuals or teams** to be responsible for updating each SOP. **Set specific times** throughout the year to conduct reviews, such as annually, quarterly or another given time frame that aligns with your slower periods.

SOPs can be used as tools for regular process improvement. They can identify inefficiencies or bottlenecks, help find the root cause of issues and encourage innovation by offering a starting point to test new ideas.

Additionally, consider scheduling revisions around key events in your office. For example, an opportune time to retest the effectiveness of the SOP for a particular process is each time a new employee performing that process is onboarded. Observing new employees using the SOP and noting gaps or unanswered questions should be a regular practice for those responsible for SOP updates.

Each revision made to an SOP should be documented within the SOP to maintain a clear history of changes to the process, noting when changes were made and by whom. An example of such a record of changes is included below.

Change Number	Section and/or Page Number	Description of Change	Date of Change	Posted By
1	Page 1	Inserted Agency mission statement	3/1/2024	E. Smith
2	n/a	Changed agency name from Board of Elections to Department of Elections	3/8/2024	H. Williams
3	n/a	Updated staff from CRM	3/15/2024	W. Gibbs
4	Table 8, Page 23	Corrected Main Contacts for Agency	3/21/2024	G. Jones
5	Table 3	Continuity Implementation Responsibilities	3/24/2024	R. Nelson
6	Table D	Contact List	3/27/2024	C. Russell

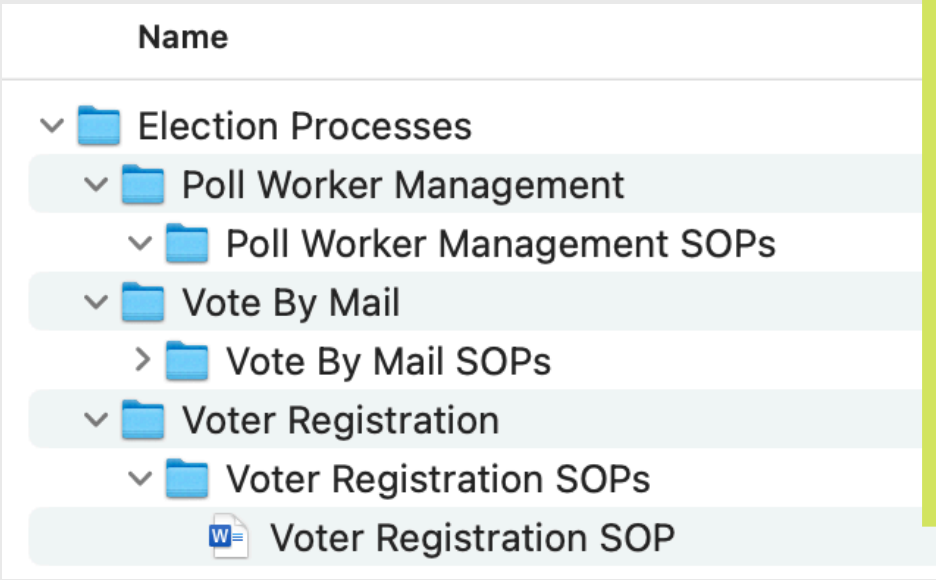


ORGANIZING SOPs

Maintaining organized and centralized SOPs is paramount for seamless office operations. SOPs scattered across personal desktops or isolated drives pose significant challenges to accessibility and consistency.

Centralizing SOP documentation in a shared location, such as a secure cloud-based platform or a designated server, ensures that all team members can easily access the most up-to-date procedures. To streamline this process effectively, consider grouping SOPs based on their respective topics or departments. Using a well-structured folder hierarchy within a shared platform can help categorize SOPs according to different functional areas or processes. For example, you may want to create a folder labeled “Voter Registration” and within that folder is a folder labeled “Voter Registration SOPs.” This approach reduces redundancy and minimizes the risk of errors resulting from conflicting information.

Furthermore, it is imperative not to overlook the significance of reviewing the lists of available SOPs and their last revised dates for each topic or department.



The screenshot shows a file explorer interface with a list of folders and files. The 'Name' column is visible. The hierarchy is as follows: 'Election Processes' (expanded), 'Poll Worker Management' (expanded), 'Poll Worker Management SOPs' (expanded), 'Vote By Mail' (expanded), 'Vote By Mail SOPs' (expanded), 'Voter Registration' (expanded), 'Voter Registration SOPs' (expanded), and 'Voter Registration SOP' (file icon).

For example, you may want to create a folder labeled “Voter Registration” and within that folder is a folder labeled “Voter Registration SOPs.” This approach reduces redundancy and minimizes the risk of errors resulting from conflicting information.

Designating a staff person to conduct quarterly or biannual audits of the shared space ensures that all SOPs can be easily located and accessed and that they remain up to date. This not only helps safeguard against potential compliance issues, but also enhances operational efficiency. Moreover, it instills confidence in team members, knowing they can rely on current and accurate SOPs to guide their work.

CONCLUSION

Developing effective SOPs is crucial for the successful administration of elections. Well-crafted SOPs mitigate risks, enhance operational consistency and communicate the commitment to uphold the integrity of every election. Just as a cooking recipe ensures a consistent outcome, effective SOPs provide the necessary steps to guide election officials through the complexities of their roles with clarity and precision.

RESOURCES

The following resources can support the development of your SOPs. The SOP Template offers a structured format to guide the drafting process, while the SOP Checklist helps ensure critical details are not overlooked. The checklist can also be used as a tool for evaluating existing SOPs, helping to identify areas for improvement.

SOP TEMPLATE

Standard Operating Procedure [Descriptive Title of the SOP]

[Insert Office/County logo]

SOP Number: [Unique identifier]
Department: [Department name]
Last Revision: [Date of the latest revision]

3. Procedure

Clearly state the purpose and objectives of the SOP. Why is this SOP important? Why does it exist? If this SOP is to be followed at a specific part of the year, be sure to indicate that.

3.1 – Overview

If more than one process is to be described, number the processes sequentially. If not, simply detail the name of the process and do not number it.

3.2 – Process 1: [Process Name]

If more than one process is to be described, number the processes sequentially. If not, simply detail the name of the process and do not number it.

3.2.1 – Purpose

Explain the purpose of this specific process. When/why is it necessary?

3.2.3 – Steps

As you outline steps, use numbered or bulleted lists, if applicable.

- Step 1: [Detailed description of the step]
- Step 2: [Detailed description of the step]
- Step 3: [Detailed description of the step]
- Continue with additional steps as necessary.

3.3 – Process 2: [Process Name]

Repeat the same structure as Process 1 for additional processes, ensuring that each process is in order of operations and clearly illustrates its connection to the previous process or overall procedure.

[SOP TITLE]

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Download the
template at
electionsgroup.com



SOP DRAFTING AND REVIEW CHECKLIST

The following resources can support the development of your SOPs. The SOP Template offers a structured format to guide the drafting process, while the SOP Checklist helps ensure critical details are not overlooked. The checklist can also be used as a tool for evaluating existing SOPs, helping to identify areas for improvement.

Element	Completed	Notes
Title, Purpose, Scope		
SOP has a clear and descriptive title	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP introduces and defines the purpose and importance of the document	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP defines the intended audience for the document	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Roles and Responsibilities		
SOP defines roles and responsibilities of staff/teams involved in the process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Glossary, Materials, References		
SOP includes a section defining key terms and explains all acronyms	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
If not linked to or included within the document, SOP has a section listing all related checklists, templates and forms and their locations	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
If not linked to or included within the document, SOP has a section detailing or linking to applicable Election Code(s) relevant to the procedure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Procedure Steps and Visuals		
SOP sections include brief introductions when detailing each process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes bulleted or numbered lists when sequential steps are part of a process	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes visuals especially when detailing objects (e.g., use the blue bin to...); equipment setup (e.g., turn the e-pollbook on by...); and navigation of technical systems (e.g., go to the login screen and...)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes flowcharts or other illustrations to detail processes that may have varying outcomes	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

Element	Completed	Notes
Testing		
SOP has been tested by non-subject matter experts for completeness and clarity (SOP should be tested again after revisions)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Revision Schedule and Filing		
SOP includes a last revised date	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a chart or list of revisions, who made the revision and when	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP notes the revision schedule (e.g., Doc reviewed annually in May)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Completed/Approved SOP is stored in an accessible, centralized location	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
Formatting		
SOP is created in a tool that allows for easy formatting/updates	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a Title page with office/county logo	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes a Table of Contents , if there are several sections	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes page numbers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
SOP includes clear section headers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

Download the checklist at electionsgroup.com





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