Center for Civic Design

Guide

Setting goals in election operations

How to prioritize, define, and begin planning goals

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Introduction

This guide outlines the next step in the planning process: taking your insights and turning them into the foundations for actionable plans to improve election operations. Use this guide and the related worksheet to set goals and start planning.

This guide is the second part of our Post-election debrief toolkit. Check out The Elections Group's companion Election Debrief Handbook if you have not debriefed your election yet.

What is goal setting?

Goal setting is identifying what you want to improve and laying the foundation for making tangible progress. It creates the momentum needed to make impactful improvements in your office.

There are 4 steps to successful goal setting:

1. **Debrief the current election.** Gather your team to identify wins and growth opportunities. Our Post-election debrief toolkit covers this.
2. **Prioritize areas that need work.** Narrow down what you want to focus on in the next election cycle.
3. **Define goal(s).** Write specific goals and make decisions about the parameters of the work needed to achieve them.
4. **Create preliminary plans for your goals.** Secure approval and resources to do the work.

Who are these guidelines for?

These guidelines are for anyone trying to set meaningful office goals. You can use them individually or with your team members.

The best time to reflect and set goals is after an election debrief with your team. We suggest that you complete a post-election debrief before you work through this guide, but you can use this advice and worksheet any time you have to plan upcoming projects.

How can I use this guide?

This guide is one of 3 tools to help you turn your ideas into plans.

- **Guide:** The guide you are reading now. Including how to prioritize, define, and create preliminary plans for your goals.
- **Worksheet:** Guided questions to help you define your goals and make a plan. It pairs with specific portions of this guide.
- **Template in Miro:** A free digital whiteboard template that walks you through narrowing down your ideas. This is an optional tool that can help you facilitate this guide.

This callout appears throughout this guide.
when you see this callout turn to the related page in the planning worksheet.

What is this guide based on?

This guide is based on interviews about planning with staff from 5 election offices across the county and our own experience running goal-setting workshops.

It was written in collaboration with the elections experts at The Elections Group.

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Prioritize your goals

At the end of your debrief with your team, you should have walked away with a list of wins, challenges, and lessons learned.

Whether you have 2 ideas or 20, remember you can't tackle everything at once. Getting excited about all the options is easy, but good planning helps you stay prepared. You need to prioritize your team's points and determine which ones to focus on first. Consider what's realistic in your office and how ready you are to make changes.

There are 5 steps to prioritizing your goals efficiently:

1. Review notes from the debrief
2. Turn your notes into actionable ideas
3. Narrow down your list of ideas
4. Choose which ideas to move forward with
5. Dig deeper into your prioritized ideas

You can work through these 5 steps yourself or with your team. Working with your team will take more time, but you will be able to capture more diverse ideas. And, you may surface things you would not have seen working by yourself.

Working with a team? Choose whether to:

- Find the time to work through these steps as a team. This can be done in person or online using a digital whiteboard.
- Work individually and compare later. If you cannot find a couple of hours to come together, set up a space where you and your team can work through these steps asynchronously over a couple of days. Record who says what so you can clarify if needed.

Whether you are doing these steps independently or with others, expect it to take up to half a work day. Make sure to add breaks or spread it out over a few days.

1. Review notes from the debrief

Gather all the sticky notes, chart paper, and notes you took during your debrief and look at everyone's thoughts in one place.

Make sure you understand all the notes. If you are unsure about something, contact the person who came up with the idea to ask for a slightly longer (but still short!) explanation.

Some thoughts might seem more like tasks than plans. For example, "Can we find purple ballot box seals? That is my favorite color." This was a real suggestion in a debrief! Before deciding what to do, think about the underlying intention behind the idea. Is there a concern about secure ballot box management? Is there a problem with the current seals? Record the underlying why on your list, but don't forget the original idea. Maybe purple seals will be part of your implementation plan!

If your notes cover different areas of work, sort them by work stream. Organizing at this level first will help you make more detailed connections when sorting. Consider using the categories from the U.S. Alliance for Election Excellence:

- Election Office Operations
- Emergencies and Security
- Voting Operations
- Communications
- Ballots and Audits
- Poll Workers

Look at one work stream at a time for steps 2-5 in this section. Repeat each step for every work stream before moving on to the next step.

2. Turn your notes into actionable ideas

With all of your notes in one place, look for patterns. (Read an article about it from Nielson Norman Group. They call it affinity diagramming.)

Group similar ideas and look for patterns

Start to group similar ideas together. Make sure to capture why you are grouping things. This can look like:

- Cluster related notes together.
- Color coding or circles to make groupings visually clear.

Then, label each group with the theme or reason they are grouped.

Once you have these initial groups, record the patterns you see. Step back and ask yourself:

- How do things connect?
- Can I create themes based on how things are grouped?

- Can these groups be broken down into smaller, more specific themes?
- After looking at all the emerging groups, should anything be rearranged?
- Are there things you want to prioritize here?
- If you are doing this with others, is everyone in agreement with how everything is sorted? Or are there diverging thoughts?

Turn grouped ideas into actionable ideas

Pause and make sure you have a moment to think creatively. Look at all your gathered ideas, one named group at a time. Make sure you give yourself a chance to record any new ideas and add them to your groupings. This is your chance to blue-sky think through possible solutions to the issues you identify in your notes.

Think about:

- What people or partnerships could you work with to solve these issues?
- What processes or programs could you focus on?
- What related activities do you have to do before tackling these ideas?
- What ideas have you had in the past that might solve these problems?
- Are there things you have seen other jurisdictions do that you want to try?
- Are there ideas you want to expand on?

Once grouped and themed, you're ready to narrow things down.

3. Narrow down your list of ideas

Now that you have your list, it is time to organize your ideas. This can be done collaboratively with other leaders in your office or independently by your office's leader.

You can narrow down your ideas using many different mediums:

- **A digital whiteboard** like the template in Miro. It's set up to walk you through all the activities in this section. You can also use digital whiteboards from Google, Microsoft, or Zoom (but you would have to create a new board from scratch).
- **A physical whiteboard** is a great option for working collaboratively in person or for anyone who likes interacting with physical objects.
- **Pen and paper** are a great option if you are working independently.

After working through the following matrices or dot voting activities, you should have a shorter list of possible projects. You will use these ideas in step 4.

Narrow down your ideas with a matrix

A matrix is a tool to help you make decisions by comparing different ideas against 2 different factors.

The following matrices are examples we have seen work in offices.

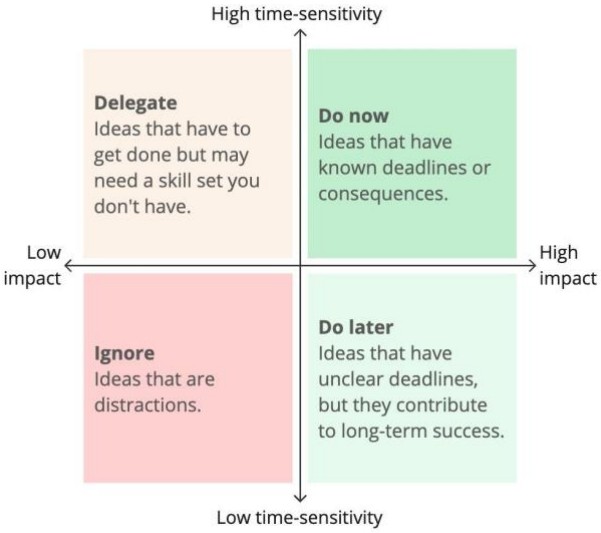
- Impact time-sensitive matrix
- Impact effort matrix
- Impact cost matrix

Where your ideas land on a matrix matters. Ideas in green quadrants are usually the ones you want to move forward with. Ideas in red quadrants are usually the ones to avoid.

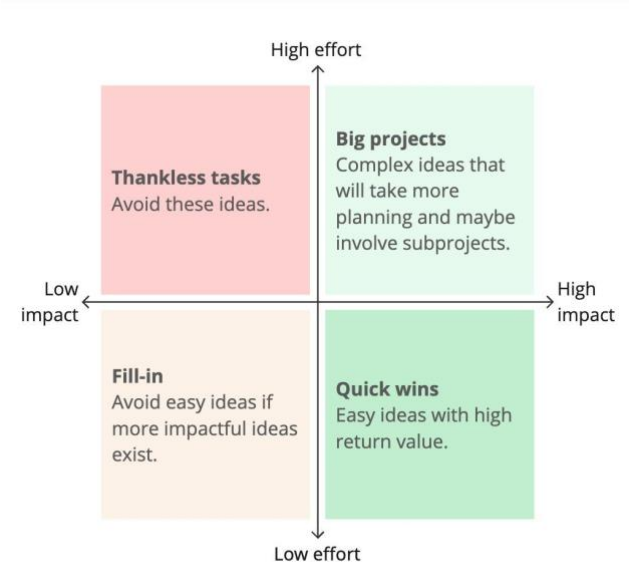
High-priority ideas	**Good ideas to implement**	**Pause and evaluate if it is the best idea**	**Deprioritize as much as possible**

Use at least one matrix to help you identify your top ideas. If you end up with lots of ideas in a high-priority quadrant, take just those ideas and look at them using a different matrix.

If you work collaboratively, you might have different opinions on where to place ideas. That's okay! Discuss your differences and work together to determine the best way forward.



Impact time-sensitive matrix
Helps you sort your ideas into the order in which you will accomplish them.



Impact effort matrix
Measures the impact of your idea against how much effort you expect it to take. The effort might not align with expected costs. Both might be important factors to help you narrow down your ideas.

Impact cost matrix
Measures the impact of your idea against how expensive you expect it to be to implement.

Use dot voting to narrow down your ideas

Dot voting is a collaborative approach where everyone votes on their favorite ideas. It shows you what your team is most excited to work on, regardless of constraints like effort or cost. You can use dot voting instead of, or in combination with, the matrices.

Give each person dots, stickers, or another marking device, and have them pick their top ideas. Make sure to limit the number of votes. The number of votes will depend on how many people are in the meeting and how many ideas there are to work through. You can

either limit a person's overall votes or votes per category. An example direction would be: "You have 3 votes. Put them on the ideas you think are most important."

Work through the dot voting exercise one work stream at a time.

Identify your top ideas from the exercises above

Pull all the top ideas you identified in the matrices and dot voting activity into a new list. These are all the ideas you will consolidate in step 4.

4. Choose which ideas to move forward with

Look at your top ideas during the matrices or dot voting activities. Now it's time to narrow your ideas down to the most impactful changes you can make between now and the next election. Start with your original ideas and keep only those that scored well in those activities. Use what you learned from the exercises to make your decisions.

You should move forward with a mix of quick-win and long-term high-impact projects. There is no Goldilocks number of ideas that can be accomplished before your next major election. You know your team's capacity and should have a rough idea of what your year might look like.

What do you do with ideas that don't make sense right now? Save them!

While you might not be able to continue with all of your team's ideas, it is important not to forget them! Put them in a spreadsheet, a clearly named file, or somewhere else that you'll be able to find again the next time you're ready to set big goals.

5. Dig deeper into your prioritized ideas

Now you have your list of ideas you want to move forward with. At this stage, they might be high-level ideas. It is time to flesh them out and record important information that will help you plan later down the road. You want to understand the feasibility of these ideas to ensure they will be achievable within the time frame you are working with.

Information to consider about your prioritized ideas

Now that you have your list of top priorities, think about what is needed to make them happen. Below is a list of questions to consider:

- **Area of work.** What department or who on your team will be responsible for this idea?
- **Overlap between ideas.** Do any of your ideas go together? Is there a specific order in which they should be done?

- **Projected level of effort.** What is the level of effort a project will take compared to its impact?
- **Project complexity**. Would a project involve a lot of time, teams, or other complicating outside factors?
- **Required service.** Is there a legal mandate, SOS directive, or other external requirement affecting this idea?
- **Risk mitigation.** How much risk is there to voters or your team if this problem is not solved?
- **Strategic alignment to wider jurisdiction goals or plans.** Are there plans or strategies you have to consider outside of your office?
- **Value to your community.** What value does this add to voters' experience? Does it add value to your relationships with external partners or other stakeholders?

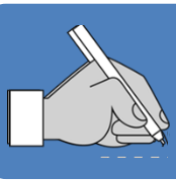
Assess against your office's values

If your office has a mission statement or values, consider how your team's ideas match them. By intentionally aligning your ideas to your values early in the process, you strengthen your plans. When your plans reflect your values, you're more likely to build trust, stay motivated, and achieve results that feel right and meaningful.

Interrogate each idea by asking yourself if and how it upholds your values. If your office doesn't have a set of values, you can use those from the US Alliance for Election Excellence. Abridged versions of these standards are in the table below.

Value	Questions to consider
High integrity We are ethical public servants committed to fair, accurate, and secure elections. We act professionally and nonpartisanally.	• Does this idea comply with federal, state, and local laws?
Comprehensive preparedness We build and implement plans to effectively administer elections, navigate challenges, and manage crises. We document written procedures to support secure and efficient processes.	• Could this idea be affected by a natural disaster, personnel issue, or security attack? • How can we audit our process and controls for this idea to make sure they work?

Value	Questions to consider
Voter-centricity We provide voters with an exceptional election experience. We deliver excellent service to make voters feel confident as they participate in the democratic process.	• Does this idea make it easier or harder for voters? How do I know? • Does this idea impact different groups of my voters differently? What can I do to ensure everyone has the same access to voting? • How can I get voters' input on this?
Proactive transparency We engage our community and other stakeholders to support understanding of the election process. We communicate information about elections so it is readily available and easy to access.	• How can I get the word out about this idea? • What will voters need to know about this idea once it is implemented?
Continuous improvement We pursue opportunities to increase the efficiency and effectiveness of election operations. We prioritize professional development to build capacity and learn from new approaches.	• How are you learning when you implement this idea? • How do you know your office is improving with this idea? • What kind of support does your office need to implement this idea? • How can your office celebrate the success of the idea?



Now go fill out sections 1 and 2 on the worksheet:

Prioritize ideas and dig deeper

Define your goals

After prioritization, it is time to write a clear set of goals for moving forward.

Defining goals gives structure. When you have open-ended goals with a vague vision for accomplishing them, it is easy to lose motivation or get distracted.

There are many ways to define your goals, but we recommend the SMART goal framework. (For more on SMART goals, see this University of California report.)

SMART goals are:

- **Specific:** Have clear, established parameters for what you want to accomplish.
- **Measurable:** The metrics you will use to determine if you met the goal.
- **Attainable:** The tools, skills, and time you need to make sure this goal is achievable.
- **Relevant:** The goal fits into your overall strategic alignment.
- **Time-bound:** Have a clear target date and preliminary deadlines so you can start scoping out the pace of the project for your goal.

Measurable success looks different for every office

Different-sized offices might have different measures of success; that's ok! When thinking about how your office defines success, think about:

- What people or partners could you work with?
- Can you test what you create? Who would you do that with?
- What processes or programs could you focus on?
- What related activities do you have to do first?
- Are there numerical metrics you can track?

Be specific about what it takes for your goal to be attainable

You might not have everything you need to implement your goal successfully. Ask yourself:

- What are the constraints for this project?
- What tools, skills, and resources will you need to achieve this activity?
- Are there things you have to do before you can implement your plans for your goal?

Keep your scope narrow

Ambitious goals are important! But you want to make sure you are setting yourself up for success. If your idea is particularly ambitious, break it into multiple projects. You are more likely to succeed when you prioritize accuracy over urgency.

Now go fill out section 3 on the worksheet:

Define your goals

Create preliminary plans for your goals

Now that you have a prioritized list of goals and have considered what needs to be done to achieve them, it's time to create the preliminary plans. Preliminary plans are the high-level documents your office might use to kick off projects. These documents could be a project proposal, preliminary brief, or a background outlining project goals, scope, and deliverables.

Once you have your preliminary plans, it's time to start working. When the work starts, a project owner creates more granular plans that outline deadlines and other unique project considerations.

Do you need approval?

If your goals need approval from someone else or another office, make sure you have all the necessary information they need. You know the best path based on how your office works.

Who will lead this project? (And who else will work on it?)

To make sure your goals work out, you need to know what your team is good at and how that might impact the size or timing of the project.

Looking at your staff, you might find that no one has all the skills to reach your goal. If that happens, what will you do? Will you train your employees at the start of the project, or will you need to hire new people or get help from another agency or organization?

Share with your team

Once you have any preliminary approvals and an idea of staffing, meet with your team to discuss the projects.

Make sure to clearly explain the goal of the meeting and what you expect from your team. Is this a time for them to share ideas and improve plans? Or are these plans the only way you will move forward?

After the meeting, make sure any documents are easy for your team to find. The documents should be simple and clear so everyone can read and use them.