Setting goals in election operations worksheet

This document supports the [**Setting goals in election operations toolkit**](https://civicdesign.org/tools/setting-goals-in-election-operations/). Use this tool to help you define your goals from a recent post-election debrief.

## Using this document

1. List out the goals you are exploring
2. Think through the high-level logistics needed for execution
3. Work through the SMART Goal approach to defining your goals
4. Use the information in this completed worksheet to start operationalizing your goals.

# 1. Prioritize your team’s ideas

Use this table to record ideas that surfaced during your post-election debrief that you want to explore further.

→ Read more on pages 5-12 of Setting goals in election operations guide

|  |  |
| --- | --- |
| **Prioritized ideas** *What ideas did you narrow down to?* | |
|  | |
| **Documentation Archive** *Where are you saving the ideas that did not make the short list?*  *(or list them here)* |  |

# 2. Dig deeper into your prioritized ideas

Use this table to record relevant information for 1 goal.If you are working through multiple goals, copy this document now for each goal you want to work through. You will have 1 table per idea.

→ Read more on pages 5-12 of Setting goals in election operations guide

|  |  |
| --- | --- |
| **Activity idea:** 1 idea from your list on the previous page | |
|  | |
| **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 they should be completed in?* |  |
| **Projected level of effort**  *Where did this idea fall on the matrices you worked through?* |  |
| **Projected level of how complicated a project would be** *Would a project involve a lot of time, teams, or other complicating outside factors?* |  |
| **Staffing**  *Who will work on this?* |  |
| **Required services**  *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 outside of your office that you have to consider?* |  |
| **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?* |  |

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## Assess against your office’s values

Use this table to evaluate your goal against your office’s values. If your office has its own set of values, edit this document to reflect them. If your office doesn't have a set of values, you can use these from [the US Alliance for Election Excellence](https://electionexcellence.org/). Abridged versions of these standards are in the table.

→ Read more on pages 5-12 of Setting goals in election operations guide

|  |  |
| --- | --- |
| **Values** | |
| **High integrity**  We are ethical public servants committed to fair, accurate, and secure elections. We act professionally and nonpartisanally. |  |
| **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. |  |
| **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. |  |
| **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. |  |
| **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. |  |

# 3. Define your goals

Use this table to record relevant SMART Goal information for the goal you worked through on the previous page of this document.

→ Read more on pages 13-14 of Setting goals in election operations guide

|  |  |
| --- | --- |
| **SMART Goal** | |
| My office will work towards our goal to [what you want to work on] from [start date] to [end date] | |
| **Specific plan** What specific improvement are you making? Make sure to list specific steps in the process. Consider your available time, resources, and staffing. | 1. [step 1]    1. **Deadline:** 2. [step 2]    1. **Deadline:** 3. [step 3]    1. **Deadline:** |
| **Attainability**  What are the constraints for this activity? What tools, skills, and resources will you need to achieve this activity? |  |
| **Measurable outcomes** What are the ways you would measure success? |  |
| **Relevant** How does this goal align with your mission, values, and current priorities as an elections office? |  |