

# CLERK ELECTION GUIDE

## CEATS CAPSTONE PROJECT



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## INTRODUCTION

One of the biggest issues of becoming a clerk is minimal training. Due to the clerk position being an elected office with term limits, turnover is inevitable, and the transition is not always smooth. There are only minimal transition requirements, and most of those requirements are only the exchange of account numbers and login accesses. New-to-office clerks must then rely on any remaining experienced office staff and teach themselves a wide variety of duties in a short period.

Here in Randolph County, our Clerk term coincides with the Presidential Election cycle, which often allows for newly elected Clerks to have a year without needing to prepare for an election, but this is not always the case. This guide has become an invaluable resource to quickly access useful information and continue to monitor upcoming deadlines for a year-long, precision-required, election process.

## PROJECT GOALS

The goal of creating a Clerk Election Guide is to be able to assist new clerks and staff with their transition without direct training that can also double as a checklist reference for experienced staff. Elections are one of the most critical and observed duties that the Clerk manages. There is very little room for avoidable mistakes such as missed deadlines and required processes. Ideally, the Clerk's Election Guide will lead new Clerk staff to at least the bare minimum/requirements, if not help them to excel by avoiding trial errors that may have already taken place in the past.

This project is relatively qualitative and difficult to measure due to the change in staff, however, experienced staff have acknowledged that such a document would still be an incredibly useful resource due to condensing all the information that they would likely need to reference into one document.

## THE PROCESS/ METHODS

The United States government consists of a living document. This means changes, amendments, and adaptations often take place to continue advancement and meet the needs of the country. There are frequent legislative changes that the Clerk's office must be diligent to adhere to changing guidelines. On top of continuous changes, there are many differences in the election cycle. In order for this resource to be useful, it must be maintained to reflect these changes.

## THE PROCESS/ METHODS (CONT.)

Clerks should receive the key materials in December of the year prior to the next election (State Election Books) and begin noting any important dates and/or legislative changes. Clerk's office staff is then able to modify the Clerk's Election Guide to reflect any major requirements, dates and deadlines, and key information/resources. The main reason the Clerk's Election Guide is so useful is the amount of condensed, commonly required information. The Election Books are thorough to include every possible instance, and the processes associated with those situations. The majority of the information is not relevant to an individual situation nor is it ideal for Clerk staff to quickly locate and review the materials provided for every situation in question. The Clerk's Election Guide is a quick reference guide for recurring, broad topics, such as which documents are used, the election timeline/calendar, important processes, and common rules/instructions. The use of this guide helps to streamline the election process to a more manageable amount of materials to review and may additionally provide an additional proof to reference after some experience is obtained.

## CEATS PRINCIPLES AND TOOLS

This project mainly references CEATS Phase II: Principles and Tools Sections 1, 2, and 6, but does lightly touch topics in other sections.

In section 1, the Indiana Election Law, The Secretary of State, and the Indiana Election Division, all play a large role in both the necessity of the Clerk's Election Guide as well as the resources for the information needed to create the guide. These resources provide the training and information that has allowed for the current processes in place to be successful.

In section 2, working knowledge of DRE Voting Systems and Electronic Poll Books are a large factor of the processes that are in place and of the election process itself. The knowledge of the election machinery used only to the extent of a voter would be detrimental to poll worker training, start-up, results, and more. While the vendors are also a valuable resource, a brief depiction of the useful functions can go a long way.

## CEATS PRINCIPLES AND TOOLS (CONT.)


In section 6, Election Personnel Training and Management Needs and Best Practices and Continuous Improvement. Clerk's Office staff are also responsible for processes that require training such as reviewing the Election Books and other resources such as the Monthly Dispatch Report. The Clerk's Election Guide is an example of a best practice as it has clarified the election process for all parties involved and is continuously updated to reflect the changes in requirements and frequently used information/ resources.

The largest factor in making this project work is the availability of information and knowing what is most relevant to the problem at hand. CEATS helps bring attention to additional resources that Clerks may not have considered worthwhile in previous applications. CEATS also instigates additional connections to others who are familiar with the same experiences and allows for discussion that produces additional solutions or modifications to less efficient processes.

## CONCLUSION

Creating and upkeeping a Clerk Election Guide enhances the basic steps of the election process for all of those involved, both directly and indirectly. This guide saves time, frustration/complications, and encourages positive experiences throughout a lengthy, and often stressful process that is running elections.

Election information is especially difficult to retain and keep separated due to the infrequency of use as well as the variances within guidelines based upon political party affiliation, elected office position, election cycle, and other many other factors. After taking the time to create the guide to your desired specifications, only minimal upkeep is required. This project could also be produced by other counties for emergency use. If experienced staff do not want a guide/reference, it may still be useful to have in the case of an emergency that requires less-familiar staff to fill in. Overall, the Clerk Election Guide document



is a project that requires a little investment of research, creation, and upkeep to make a significant difference in the election process.

## REFERENCES

Annual State Election Books: Candidate Guide, Campaign Finance Manual, Election Administrator's Manual, Election Calendar Brochure, Voter Registration Guidebook, and Political Signs & Disclaimer Brochure.

IN.Gov SOS - Election Forms page

## ACKNOWLEDGEMENT

Creation of a quick guide/cheat sheet that works for both Clerk staff and candidates for candidate filing was inspired/recommended by White County. We plan to expand this idea a few steps further and create an entire election timeline with included relevant/helpful documents.

