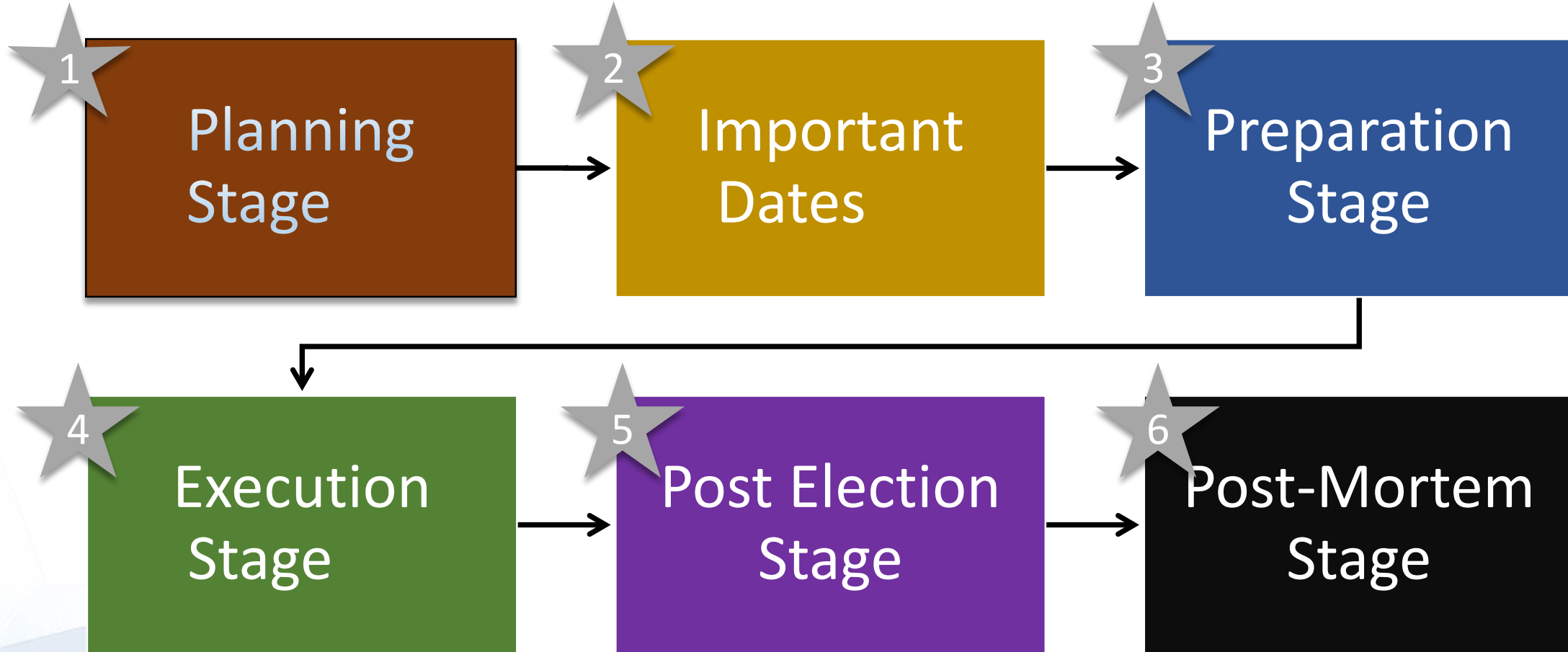


PROJECT MANAGEMENT

Debbie Abrego
Election Security Trainer
March 21, 2023





Planning Stage

- ✓ Begin the Planning Stage at least 6 months in advance from Election Day.
- ✓ Determine Key Dates
- ✓ Identify the Entities on the Ballot
- ✓ Meet with the Entities
- ✓ Estimate the Costs
- ✓ Initiate a Project Plan
- ✓ Maintain and update Project Management Tool on a regular basis for the duration of the election.

<i>*if applicable</i>	<i>deadline dates</i>	
Elections Chronological Project Plan		Progress %
		SOS RESOURCE REFERENCE/BEST PRACTICE RECOMMENDATIONS
Planning Stage		November 2023 Important Dates
Determine Key Dates	100%	REFERENCE: Election Law Calendar - 2021
Identify Entities	85%	Send out an email to Entities if they're having an election
Estimate Costs	50%	Elections Funds Management Quick Links
Initiate Project Plan		PRESENTATION: Ordering Your Election
Create Election Passwords	10%	Check with your contracted vendor for timelines/deadlines
*Staff Progress Meeting 1		Multi staff offices - Best Practice to meet with Key Staff to give updates on progress and duties assigned
Hire Temporary Workers (VR, Mail, Warehouse, Techs)		
Select Workers (Require Background Checks)		ADVISORY 2019-23 - Section 9 - Voting System Security
Poll Worker Training	20%	Online Pollworker Training
Schedule Classes/Judges and Clerks		Setup schedule in Event Brite or other Scheduling Application
Dates to Conduct Poll Worker Training		Texas Election Training Portal
*Regional Sending Sites selected		Election night drop off sites
*Regional Sending Staff selected		
*Regional Sending Material/Supplies Assembled		
Supply review meeting - election kits and office supplies		
Inventory and Order Ballot Stock		
Inventory and Order Envelopes for ABBM and Kits		
Ink for Ballot on Demand or any Central Count printers		
Entity(s) Meeting 1 - Introductions/Schedule Dates		Topics to discuss in your first planning meeting with Entities on the ballot
Entity(s) Meeting 2 - Estimate Cost(s)/Fees, Select EV Sites		Topics to discuss in your second planning meeting with Entities on the ballot
Entity(s) Meeting 3 - Finalize Entity Election Day Sites		Topics to discuss in your third planning meeting with Entities on the ballot
Entity(s) Meeting 4 - Contract Process and Final Review		Topics to discuss in your final planning meeting with Entities on the ballot
*Submit Site Support Request to Vendor		Check with your vendor for timelines/deadlines
Post Public Notice of Filing Period		
Order Election from Commissioner's Court		
Notice of Web Posting		REFERENCE: Election Advisory 2019-19 - Web Posting Requirements



(These dates are subject to changes from the 2023 legislative session.)

- First Day to Apply for Ballot By Mail
- First Day to Apply for FPCA
- First Day to File for Place on Ballot
- Last Day to Order a General Election
- Last Day to File for a Place on the Ballot
- Federal "MOVE" Ballot Deadline
- Last Day to Register to Vote
- Last Day to Apply for Ballot by Mail
- Early Voting by Personal Appearance
- Election Day
- Last Day to Receive FPCA Ballot

Important Dates <small>(These dates are subject to changes from the 2023 legislative session.)</small>	
First day to Apply for a Ballot By Mail	Sunday, January 1, 2023/ FORM: Application for Ballot By Mail
First day to Apply for a FPCA	Sunday, January 1, 2023
First Day to File for Place on General Election Ballot (for local political subdivisions ONLY)	Saturday, July 22, 2023 ("first day" does not move; office hours not required)
Last Day to Order a General Election or Election on a Measure	Monday, August 21, 2023
Last Day to file for a place on the ballot	Monday, August 21, 2023 at 5:00 p.m.
Federal "Move" Ballot Deadline	Saturday, September 23, 2023/ Federal "MOVE" Act Advisory - 2022
Last day to register to Vote	*Tuesday, October 10, 2023 / VOTETEXAS.GOV - Register to Vote
Last day to Apply for a Ballot By Mail	Friday, October 27, 2023
Early Voting by Personal Appearance	Monday, October 23, 2023 - Friday, November 3, 2023
ELECTION DAY	Tuesday, November 7, 2023
Last Day to Receive FPCA ballot	Monday, November 13, 2023



Preparation Stage

- Determine Voting Equipment needs
- Initiate & Schedule Sheriff's for EV and ED
- Process **ALL** VR apps received **BEFORE** VR deadline
- Finalize the Official OLRV
- Candidate Filing Period
- Build master election in TEAM
- Election Night Reporting (ENR)
- Program Election in Voting System
- Proofing Ballots and Media
- Ballots By Mail
- Pre-Election Day/Night Prep

PREPARATION STAGE		Voter Registration Resources
Weekly Review/Progress Meeting - *Staff Progress Meeting 2		Multi staff offices - Best Practice to meet with Key Staff to give updates on progress and duties assigned
Determine voting equipment needs		
Create USB/Media		
Create Master Election in VR System		
Populate Disaster Recovery site with VR data		
Disconnect Disaster Recovery server from network		
Populate Disaster Recovery site with Election data		
*Contract/Schedule Transportation		
Initiate/Schedule Sheriff Security for Early Voting, Supply Distribution & Election Day		
Meet with Sheriff/Lead for assigned Deputies to discuss dates, high voter sites and campaign issues		Certain Activities in vicinity of Polling Places
Process ALL VR applications received before VR deadline		
Finalize the Official OLRV		
Build Voter Registration and GIS (Geographic Information System) Web data		
Candidate filing period		Contact the TEAM team at 1-800-252-8683 option 1 for assistance
First Day to file an application for a place on the Ballot		FORM: Application for Place on the Ballot
Write In Candidates		FORM: Declaration of Write-In Candidate in General
Notice of Drawing for Place on the Ballot		
Last day for Candidate to Withdraw from ballot		FORM: Certificate of Withdrawal
Receive race & ballot order from Local/Parties		
Submit Final candidates file info to Election Vendor		Check with Vendor on deadline dates
Certified Ballot by SOS of Constitutional Amendments		
Sample Ballot		Shell for Forms Sheet/Sample Ballot
Build master election in Voter Registration system (TEAM)		Contact the TEAM Team at 1-800-252-8683 option 1 for assistance
Build election in TEAM		
Establish election calendar		
Assign/Proof Precincts to Poll Sites (Mapping/Pcts)		
Assign Dates/Times to Poll Sites		
Assign/Proof District to Office assignments		



Execution Stage

- Final review & updates
- Tabulate Votes
- Process EV Payroll
- Partial Manual Recount
- Canvass
- Post/Publish Final Reconciliation Form
- Publish Canvass Reports to Web & SOS

EXECUTION STAGE		
FINAL Review/Progress Meeting		
Early Vote - election days		Multi staff offices - Best Practice to meet with Key Staff to give updates on progress and duties assigned
*Check/Test Phone System & Messages		First and Last day of Early Voting by Personal Appearance
Extract VR system EV Poll Books		Daily task during election period for VR and ABBM staff
Early Voting Equipment Distribution		Upload voter registration information and pack equipment
Execute Daily Day Mast Reports		Brief last minute reminders and supply pickup.
Update EV Results on Web		Daily task during early voting period for information requests
		Daily task for IT during early voting period
Process Judges Payroll		
Early Voting 1st Week		Process and submit to Auditor's or Payroll Vendor the day after 1st week of EV ends
Early Voting 2nd Week		Process and submit to Auditor's or Payroll Vendor the day after 2nd week of EV ends
Election Day Payroll - all Voter Centers/Poll Sites		Collect and account for all poll sites the days after Election Day. Submit to Auditor's or Payroll agency
Election Day Prep		
Activate Election Day Results Link on Web		
*Implement Phone Banks & Tech Support		
Tabulate Votes		
Process Paper Ballots		
Process Electronic votes		
Process Ballot Remakes		
Update SOS Web Site with preliminary results		
Update County website with preliminary results		
Process Provisional ballots		
Process Military Mail ballots		
Post/Publish Preliminary Reconciliation Form		
Election Night Recovery		
Partial Manual Recount - Mandated by law		
Generate/Print Canvass Reports		
Canvass		
Provide Canvass Report Copies to Entities that contracted with County		
Publish Canvass Reports to Web & SOS		
Post/Publish Final Reconciliation Form		



Post Election Stage

- Email Reasonable Impediment Forms
- Evaluate Incident Reports
- Process ED Payroll
- Evaluate Hardware Failure Reports
- Publish Final Election Results
- Post Review/Progress Updates

Post Election Stage	PRESENTATION: Practical Actions After the Election - Manual Recount reference
Post Review/Progress Meeting	Multi staff offices - Best Practice to meet with Key Staff to give updates on progress and duties assigned
Reconcile Election System to VR system Totals	
Process Election Day payroll	
Update permanent voting history in VR system	
Email Reasonable Impediment Forms to SOS	
Collect/Evaluate Incident Reports	
Collect Hardware Failure Reports	
Publish Final Election Results	
Process Facility Expense Reports	
Financial Reporting to SOS - primary only	



Post-Mortem Stage

- Inventory ePollbooks/Laptops & Printers
- Reconcile Inventory/Chain of Custody Reports
- Inventory Hardware
- Package/Store Records for 22 months
- Publish by Mail stats

<small>*if applicable</small>	<small>deadline dates</small>	Progress %	SOS RESOURCE REFERENCE/BEST PRACTICE RECOMMENDATIONS
Elections Chronological Project Plan			
Post-Mortem Stage			
Post Mortem Staff/Progress Meeting			Mail staff offices - Best Practice to meet with Key Staff to give updates on progress and duties assigned
Reset Web Links & Apps			
Publish Election Reports to Web			
Inventory E-Pollbooks/Laptops and Printers			
Inventory Cell Phones			
Reconcile Inventory/Chain of Custody Reports			
Inventory Hardware (cars,kits e-poll books,laptops, etc.)			
Inventory USB/Media Sticks & Forms			
Copy Flash drive data to storage media			
*Deactivate IVR system			
Dis-assemble carts & kits			
Package/Store records for 22 months			61 st day transfer to sealed secure containers
Publish Equipment Failure Reports - Election Vendor, EAC			
Publish By-Mail Statistics - FVAP, EAC			



Conducting Your Elections

Conducting Your Elections

Laws and Procedures Pertaining to:

- [County Chairs of Political Parties](#)
- [County Election and Voter Registration Officials](#)
- [Local Election Official \(Cities, Schools, and Other Political Subdivisions\)](#)

Notable Links

- [Texas Election Security Update](#)
- [Election Officials and Officeholders](#)
- [Election Forms](#)
- **Revised:** [Election Complaint to the Secretary of State \(PDF\)](#)
- [Elections Acronyms and Abbreviations](#)
- **Revised:** [Elections Glossary \(For All Election Officials\)](#)
- [Glossary of Spanish Terminology/Términos de Elecciones](#)
- [Texas Election Code](#) (Texas Legislative Council)
- **Revised:** [Poll Watcher's Guide \(PDF\)](#)

Outreach

- [VoteTexas.gov](#)
- [Project V.O.T.E.](#)



Voter ID Requirements

REVISED:

[Acceptable Forms of Identification \(PDF\)](#)

[Notice of Acceptable Identification Poster \(English\) 8.5x11 \(PDF\)](#)

[11x17 \(PDF\)](#)

[24x36 \(PDF\)](#)

[Notice of Acceptable Identification Poster \(Spanish\) 8.5x11 \(PDF\)](#)

[11x17 \(PDF\)](#)

[24x36 \(PDF\)](#)

[VoteReady Information Card English \(PDF\)](#)

[Spanish \(PDF\)](#)

[Forms](#)

Court Orders

[Archived Court Orders](#)



Forms, Resources and Legal Library

Links to –

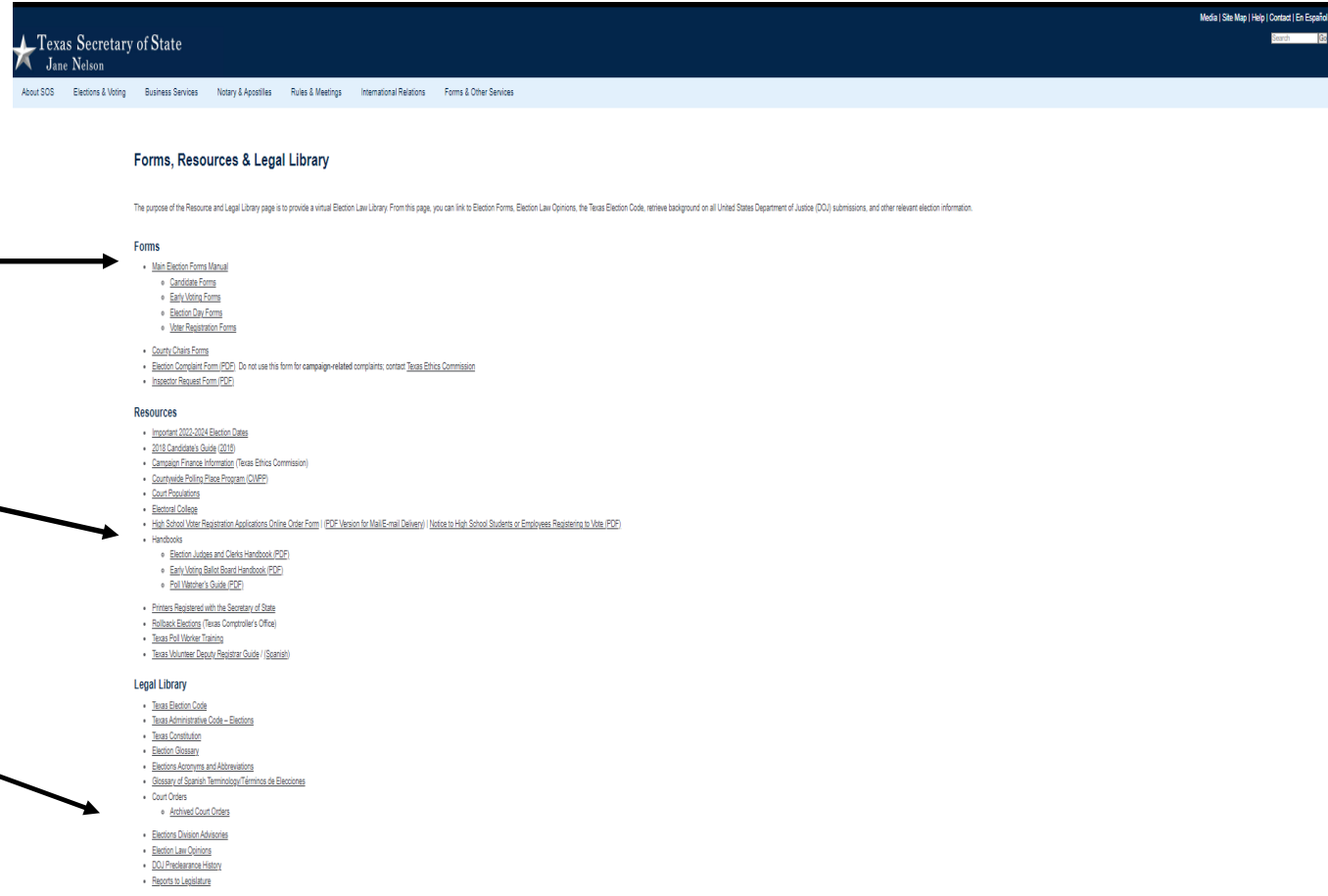
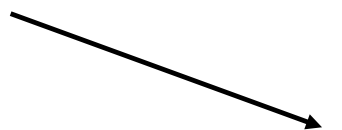
Forms Manual



Resources



Election Advisories



Texas Secretary of State
Jane Nelson

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About SOS | Elections & Voting | Business Services | Notary & Apostilles | Rules & Meetings | International Relations | Forms & Other Services

Forms, Resources & Legal Library

The purpose of the Resource and Legal Library page is to provide a virtual Election Law Library. From this page, you can link to Election Forms, Election Law Opinions, the Texas Election Code, reheve background on all United States Department of Justice (DOJ) submissions, and other relevant election information.

Forms

- [Main Election Forms Manual](#)
 - [Candidate Forms](#)
 - [Ballot Marking Forms](#)
 - [Election Day Forms](#)
 - [Voter Registration Forms](#)
- [County Chairs Forms](#)
- [Election Complaint Form \(PDF\)](#) Do not use this form for campaign-related complaints; contact [Texas Ethics Commission](#)
- [Inspector Request Form \(PDF\)](#)

Resources

- [Important 2022-2024 Election Dates](#)
- [2018 Candidates Guide \(2018\)](#)
- [Campaign Finance Information \(Texas Ethics Commission\)](#)
- [Countywide Polling Place Program \(CWPP\)](#)
- [Court Populations](#)
- [Electoral College](#)
- [High School Voter Registration Applications Online Order Form \(PDF Version for Mail/E-mail Delivery\) | Notice to High School Students or Employees Registered to Vote \(PDF\)](#)
- [Handbooks](#)
 - [Election Judges and Clerks Handbook \(PDF\)](#)
 - [Early Voting Ballot Board Handbook \(PDF\)](#)
 - [Poll Worker's Guide \(PDF\)](#)
- [Formerly Registered with the Secretary of State](#)
- [Rollback Elections \(Texas Comptroller's Office\)](#)
- [Texas Poll Worker Training](#)
- [Texas Volunteer Deputy Registrar Guide \(Spanish\)](#)

Legal Library

- [Texas Election Code](#)
- [Texas Administrative Code – Elections](#)
- [Texas Constitution](#)
- [Election Statistics](#)
- [Elections Acronyms and Abbreviations](#)
- [Glossary of Spanish Terminology/Términos de Elecciones](#)
- [Court Orders](#)
 - [Archived Court Orders](#)
- [Elections Division Advisories](#)
- [Election Law Opinions](#)
- [DOJ Petition/Response History](#)
- [Petitions to Legislature](#)

https://www.sos.texas.gov/elections/laws/resources_legal.shtml



Election Law Calendars

November 7, 2023 - Uniform Election Date	
<i>These dates are subject to changes from the 2023 legislative session.</i>	
Authority Conducting Elections	Local Political Subdivisions and Counties
Deadline to post candidate requirements [§] Form 1-15 (PDF)	Monday, November 7, 2022
First day to apply for a ballot by mail using Application for a Ballot by Mail (ABBM) or Federal Post Card Application (FPCA).	Sunday, January 1, 2023* <i>*First day to file does not move because of New Year's Day holiday. An "Annual ABBM" or FPCA for a January or February 2023 election may be filed earlier, but not earlier than the 60th day before the date of the January or February election.</i>
Deadline to post notice of candidate filing deadline	Thursday, June 22, 2023 for local political subdivisions that have a first day to file for their candidates ¹
First Day to File for Place on General Election Ballot (for local political subdivisions ONLY) ¹	Saturday, July 22, 2023 ("first day" does not move; office hours not required)
Last Day to Order General Election or Election on a Measure	Monday, August 21, 2023
Last Day to File for Place on General Election Ballot (for local political subdivisions ONLY) ²	Monday, August 21, 2023 at 5:00 p.m. See note below relating to four-year terms ³
Last Day to Register to Vote	Tuesday, October 10, 2023* <i>*First business day after Columbus Day</i>
First Day of Early Voting by Personal Appearance	Monday, October 23, 2023 (17th day before election day falls on a Saturday, first day moves to next business day)
Last Day to Apply for Ballot by Mail (Received, not Postmarked)	Friday, October 27, 2023
Last Day of Early Voting by Personal Appearance	Friday, November 3, 2023
Last day to Receive Ballot by Mail	Tuesday, November 7, 2023 (election day) at 7:00 p.m. if carrier envelope is not postmarked, OR Wednesday, November 8, 2023 (next business day after Election Day) at 5:00 p.m. if carrier envelope is postmarked by 7:00 p.m. at the location of the election on Election Day (unless overseas or military voter deadlines apply) ⁴

For the few entities who do not have a first day to file: For the May 6, 2023 election, Wednesday, January 18, 2023 is the deadline to post notice of candidate filing deadline for local political subdivisions that do not have a first day to file for their candidates. For the November 7, 2023 election, Saturday, July 22, 2023 is the deadline to post notice of candidate filing deadline for local political subdivisions that do not have a first day to file for their candidates.

Local political subdivisions include: cities, school districts, water districts, hospital districts, and any other local government entity that conducts elections. Many of these elections are conducted on the May uniform election date. Note: Counties may also be holding local proposition (measure) elections on May 6, 2023.



https://www.sos.texas.gov/elections/laws/resources_legal.shtml

Contact Information

EMAILS

elections@sos.texas.gov OR electionsecurity@sos.texas.gov

PHONE NUMBER

1.800.252.VOTE (8683)





Q&A

