Election Monitoring Packet

The General Commission on the Status and Role of Women (GCSRW)

GENERAL COMMISSION ON THE STATUS & ROLE OF WOMEN
THE UNITED METHODIST CHURCH

Introduction

In addition to GCSRW's comprehensive *A How-to Guide to Monitoring*, this Election Monitoring Packet was developed to assist you with monitoring during election processes. Examples of this may include delegate elections or episcopal candidate elections. To help prepare for this work, it is highly recommended that at least two people are uniquely assigned to monitor these elements of Annual Conference or Jurisdictional Conference sessions, in addition to the monitors who are already monitoring business sessions, generally. The general session monitors should continue to document who is speaking throughout this session, how often, etc.

Parts of this process will greatly depend on your Annual Conference context. For example:

If your Annual Conference nominates delegates digitally, you should track who is nominated, their identifiers, and who is officially elected. In that context, it would be nearly impossible to document who nominates people.
If your Annual Conference nominates delegates directly from the floor, your general session monitors should track the identifiers of who makes those nominations, while your election monitors should track who is nominated, their identifiers, and who is officially elected.
If your Annual Conference nominates through some other format or some combination of the above, you will want to track as much data and information as possible.

This means that you may not use every part of every form in this packet. If you must prioritize certain data, those who are officially elected alongside their identifiers would be most helpful for GCSRW.

Election processes can move quickly, while also having the potential to be lengthy. While much of this work can be done in real time, you can also go back and fill in missing information after the elections are over. Missing information can potentially be obtained via any registration data that you may access to, any other monitoring reports which may include data, and even by asking people how they prefer to self-identify. For more foundational work in the data gathering process, please refer to *A How-to Guide to Monitoring.*

How to Monitor an Election

First, gather the forms that you may need. You can find them as PDFs in the appendix of this document or in Word format on our website (gcsrw.org). The PDF version does not allow you to edit, but the Word version does.

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The following forms include language around “Delegate Elections.” However, this phrasing can be changed to accommodate other elections such as those for Episcopal Candidates. There are three primary forms in this packet:

- Election Monitoring Sheet (X & Circle Tracking Options)
- Delegate Elections Ballot Tracker (X & Circle Tracking Options)
- Final Elected Delegates Tracker

It should be noted that not every Annual Conference may need each sheet. Please utilize which makes the most sense for your context.

Election Monitoring Sheet – X & Circle Tracking

The Election Monitoring Sheet is for the designated election monitors to document the names of persons nominated for election. The regular session monitors will primarily document who is nominating people, while the election monitors will document those who are nominated. During election processes, it is not uncommon for a list of nominated delegates to be available prior to the session where voting occurs. If that is the case, it is useful to pre-populate your tracking sheets with those names and demographic identifiers. You may find it helpful to list these in alphabetical order, however it is not necessary. In addition, there will likely be nominations from the floor. You will want to make note of those names as they are lifted up and add them to the tracking sheet. In certain Annual Conferences, all nominations may come from the floor.

For the Election Monitoring Sheet, you have two options to choose from. You can utilize an **X Tracking Sheet** or a **Circle Tracking Sheet**. This is completely up to your personal preference. On the **X Tracking Sheet**, you would make an “X” or other mark in each column as appropriate. On the **Circle Tracking Sheet**, you would circle each identifier as appropriate. As you make note of each line’s information, remember that it is more important to document a person’s identifiers rather than their name and district information. This is because the reporting data is aggregated and not attached to names.

You have also been provided with a column for additional observations and notes. Examples of what to document there might include:

- If a person identifies with another characteristic not listed.
- If a person was nominated ahead of time or from the floor.
- If a person is endorsed by any group, list the group. Examples can include caucus groups, United Women in Faith, United Methodist Men, etc.
- If a person is elected, what ballot number they were elected on.

At the end of the voting session, total each column by number on each page, then add the pages together if you have utilized more than one. This raw data can help form the basis for any narrative that you would like to report from the session.

Delegate Elections Ballot Tracker – X & Circle Tracking

Once voting begins, you will want to use this sheet to track ballots. Here, you can also pre-populate delegate names if they are known ahead of time, adding in any that are raised from the floor. The first page tracks name, district, gender, and ballot number. Due to GCSRW's particular interest in gender, that identifier was included for quick reference on this page, while the other identifiers will have been documented more fully on the Election Monitoring Sheet. During this process, you may want to have someone taking photos of each ballot as they are shown to the body. This will help with your data accuracy later.

For each ballot, you will see a column to indicate exactly who received how many votes. At the bottom of the column, you will also want to document the total number of votes cast, any invalid votes, and the total number needed to elect a delegate. If you have a large number of delegates to vote on, you may need duplicate copies of each page. Please note that the first page lists ballots 1 through 8, and the second page lists ballots 9 through 16. For the latter ballots, it is likely that there are less delegates being voted on per ballot, which is why you have less space on the sheet. Should you need more rows, you can write them in.

When a person is elected, you may want to make a star by their name, and circle on which ballot number they were elected. This will help with your data accuracy for the final form.

Final Elected Delegates Tracker

Once delegates are elected, you will want to have your Election Monitoring Sheet and Delegate Elections Ballot Tracker available for reference. You will take all elected delegates and document their information on this sheet. You will include their name, the ballot number they were elected on, the number of votes they received, any endorsements, whether they were nominated from the floor, and if yes, who nominated them.

If you are struggling to locate who nominated a person, cross-check with the other monitors who have been tracking the session, generally. You may also be able to watch recordings and/or livestreams of your conference session to help fill in any missing data.

Using the Data

After you have analyzed the data received from the election process, you should use it to help share data, graphics, and other information back with the body. It is always helpful to share the aggregate identifiers of all those elected. Please reference the "Best Practices for Gathering & Sharing Information" section of *A How-to Guide to Monitoring* to assist with crafting a narrative for this work.

Training for this Packet

Just as GCSRW is available for training on the entire monitoring process, if you are interested in training on this particular effort, do not hesitate to reach out to us at info@gcsrw.org. We are happy to answer any questions, brainstorm ideas, or talk through concerns you may have. We know that this is not a perfect process, and it takes feedback from volunteers like you to make monitoring even better!

Appendix

- Election Monitoring Sheets – X & Circle Tracking
- Delegate Elections Ballot Tracker – X & Circle Tracking
- Final Elected Delegates Tracker

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Election Monitoring Sheet – X Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

List all delegates nominated, whether nominated ahead of time or from the floor. If elected, note the ballot when the person is elected and if they were endorsed by any groups or nominated from the floor.

List All Persons Nominated		Gender			Race/Ethnicity							Age				Status		Disability		*Add'l. Observations*
Delegate Name	**District**	**F**	**M**	**NB**	**A**	**B**	**H/L**	**NA**	**PI**	**W**	**MR**	**Y**	**YA**	**A**	**OA**	**C**	**L**	**Y**	**N**	**Notes**
Totals																				

Notes can include nomination ahead of time or from the floor, nominated by whom, etc.

Any other comments/observations to note?

Abbreviation Key: ***F*** *– Female,* ***M*** *– Male,* ***NB*** *– Non-Binary;* ***A*** *– Asian,* ***B*** *– Black,* ***H/L*** *– Hispanic/Latine,* ***NA*** *– Native American,* ***PI*** *– Pacific Islander,* ***W*** *– White,* ***MR*** *– Multiracial;* ***Y*** *– Youth (12-17),* ***YA*** *– Young Adult (18-30),* ***A*** *– Adult (31-64),* ***OA*** *– Older Adult (Over 65);* ***C*** *– Clergy,* ***L*** *- Laity*

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Election Monitoring Sheet – X Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

List all delegates nominated, whether nominated ahead of time or from the floor. If elected, note the ballot when the person is elected and if they were endorsed by any groups or nominated from the floor.

List All Persons Nominated		**Gender**			**Race/Ethnicity**							**Age**				**Status**		**Disability**		*Add'l. Observations*
Delegate Name	**District**	**F**	**M**	**NB**	**A**	**B**	**H/L**	**NA**	**PI**	**W**	**MR**	**Y**	**YA**	**A**	**OA**	**C**	**L**	**Y**	**N**	**Notes**
Totals																				

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Election Monitoring Sheet – Circle Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

List all delegates nominated, whether nominated ahead of time or from the floor. If elected, note the ballot when the person is elected and if they were endorsed by any groups or nominated from the floor.

List All Persons Nominated		Gender			Race/Ethnicity							Age				Status		Disability		*Add'l. Observations*
Delegate Name	**District**	**F**	**M**	**NB**	**A**	**B**	**H/L**	**NA**	**PI**	**W**	**MR**	**Y**	**YA**	**A**	**OA**	**C**	**L**	**Y**	**N**	**Notes**
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
Totals																				

Notes can include nomination ahead of time or from the floor, nominated by whom, etc.

Any other comments/observations to note?

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Election Monitoring Sheet – Circle Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

List all delegates nominated, whether nominated ahead of time or from the floor. If elected, note the ballot when the person is elected and if they were endorsed by any groups or nominated from the floor.

List All Persons Nominated		**Gender**			**Race/Ethnicity**							**Age**				**Status**		**Disability**		*Add'l. Observations*
Delegate Name	**District**	**F**	**M**	**NB**	**A**	**B**	**H/L**	**NA**	**PI**	**W**	**MR**	**Y**	**YA**	**A**	**OA**	**C**	**L**	**Y**	**N**	**Notes**
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
		F	M	NB	A	B	H/L	NA	PI	W	MR	Y	YA	A	OA	C	L	Y	N	
Totals																				

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Delegate Elections Ballot Tracker – X Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

		Gender			Ballot Number							
Delegate Name	**District**	**F**	**M**	**NB**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**

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Delegate Elections Ballot Tracker – X Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

		Gender			Ballot Number							
Delegate Name	**District**	**F**	**M**	**NB**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**
# Cast												
# Invalid												
# Needed to Elect												

Observations to Note:

***Abbreviation Key: F** – Female, **M** – Male, **NB** – Non-Binary*

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Delegate Elections Ballot Tracker – Circle Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

		Gender			Ballot Number							
Delegate Name	**District**	**F**	**M**	**NB**	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
		F	M	NB								
		F	M	NB								
		F	M	NB							

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Delegate Elections Ballot Tracker – Circle Tracking

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

		Gender			Ballot Number							
Delegate Name	**District**	**F**	**M**	**NB**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
		F	M	NB								
# Cast												
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Observations to Note:

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Final Elected Delegates Tracker

Event: _____ **Date:**_____

Observer's Name:_____ **Start Time:** _____**End Time:**_____

Elected Delegate	Ballot #	# of Votes (X of Y votes)	Endorsements (Caucus, Groups, etc.)	Floor Nominee? (Y/N)	Nominated by Whom?

Optional notes from their election speeches, if any:

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