Pre-Election Checklist

Some things it may be helpful to resolve before holding an election

This guidance for facilitators and Internal Coordinators is about sequencing: making sure any **tensions around mandate, membership, conflict, or process are surfaced and addressed before the election begins**. That way the election itself can focus on deciding who will be best for the role, not unresolved issues.

1. Mandate Clarity

- Have the role's purpose, accountabilities, and domains been read aloud and/or displayed in an accessible way?
- Is the tenure of the appointment clear?
- Does everyone agree this matches the team's current needs?
- If there are tensions about whether the mandate is right or needs amending → resolve or note them first (may need an IDM proposal before an election).

2. Circle Clarity

- Is it clear who is a member of the circle and who has consent rights in the election?
- Have new or visiting people been welcomed and boundaries explained?
- Have steps been taken to ensure all members, including under-represented voices, feel able to participate fully?
- If there are contested questions about circle membership, pause and address those first.

3. Readiness of the Circle

- Has enough information been shared about what the role requires (time, skills, relationships)?
- Do people feel the role is ripe to be filled (not premature, not overdue)?

- Have potential candidates from under-represented groups been encouraged and supported to stand, if willing?
- If doubts remain about timing or necessity, test these tensions before proceeding.
- Can the role be shared, and, if so, has the circle considered whether it is willing to have more than one person appointed to the role? (See notes below)

4. Conflict & Relationship Health

- Are there known interpersonal conflicts that could distort the election?
- Has there been a chance for people to voice underlying tensions in another setting (e.g. a conflict process, the Advice Process)?
- If the election risks becoming a proxy battle, do what you can to mitigate the conflict separately.

5. Procedural Clarity

- Has the facilitator confirmed which election process will be used (Considered Majority Vote or Integrative Election)?
- Does everyone understand the steps (nominations, clarifying questions, secret ballot, objections integration)?
- Is there consent to use this process now, under the time available?

6. Right Ordering Check

- Take a brief pause or moment of silence to centre the group.
- Ask: “Is there anything that must be resolved before we can move ahead in good order?”
- Only proceed once there is shared confidence the conditions are met.

Advisory Notes

Experience has shown that two co-coordinators can work well. Three can work or be unwieldy depending on the individuals. Four or more are unlikely to work as well as coordination requires a lot of decision making and you’ll need to decide how to do that. The more people, the less likely you’ll get agreement on how to proceed.

When co-coordinators are not in agreement there is the potential for confusion and difficulty within the wider team. A formal group agreement about decision making and communication may be

helpful. Here is a template agreement you can copy and adapt.

> - For any coordinator decision or communication we agree to seek agreement between all co-coordinators before we share it with the wider team.
> - If we cannot reach agreement with our co-coordinators then we agree to explain this to the circle during a meeting. We can then share our individual opinions.
> - We agree that information and communication shared outside the team requires agreement from all co-coordinators regarding content and distribution.
