

# 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.
-