Operational and Communications Toolkit
Public Records Requests

PLEJ
PARTNERSHIP FOR LARGE
ELECTION JURISDICTIONS

Handling public records requests efficiently and transparently is an important responsibility of elections administrators. Doing so maintains public trust and ensures compliance with legal requirements. This generic, nonpartisan resource offers best practices around planning for and responding to public records requests, as well as guidance for communicating with the public and the media. It includes an outline for operational response, templates for social media, and voter-facing information. These can be easily adapted for any election office and provide a starting place for nonpartisan communication with voters about ballot issues. Keep in mind, these are just samples and guides. We encourage you to adapt them to your jurisdiction's needs and make them your own, and to consult your state, county, or city attorney where necessary.

Operational Response Template

This Operational Response Template outlines the steps that election officials can take to help ensure timely and accurate responses to public records requests as they arise. These guidelines are based on best practices, and are organized based on the situation and audience.

Planning Phase	Steps to Consider
Preparation	**1. Establish a Request Management System** • Implement a tracking system to log all incoming requests, track their status, and ensure timely responses. • Use dedicated software or spreadsheets to monitor the progress of each request. It is important to categorize the requests by date received. • If possible, utilize a Captcha test to filter out requests from bots. **2. Designate a Public Records Officer** • Appoint a specific individual or team responsible for managing public records requests. • Ensure they are trained in relevant laws, procedures, and best practices. **3. Develop Standard Operating Procedures (SOPs)** • Create a detailed SOP document outlining the steps for processing requests, including timeframes, exemptions, and communication protocols. • Include a checklist for staff to use to ensure all requests are handled consistently and thoroughly. • Consider creating a document or FAQ page on your website explaining the types of public records that are available. **4. Document Management** • Maintain organized and accessible records, including emails, reports, meeting minutes, and other documents. • Use a centralized document storage system to facilitate quick retrieval of records. • Post frequently-requested documents on your website. • Collaborate with your IT department for assistance in locating responsive documents such as emails, text messages, or other electronic data. **5. Training and Awareness** • Train staff on public records laws, the importance of transparency, and how to recognize and route requests appropriately. • Hold regular refreshers and updates on any changes to laws or procedures. • Consult with your legal counsel to develop approved template language and procedures for handling bulk or repetitive similar requests.

Operational Response Template

This Operational Response Template outlines the steps that election officials can take to help ensure quick and comprehensive responses to ballot delivery or content issues as they arise. These guidelines are based on best practices, and are organized based on the situation and audience.

Planning Phase	Steps to Consider
Operational Steps	**1. Acknowledgment and Initial Response** • Acknowledge receipt of the request within the timeframe as required by your jurisdiction, providing a unique tracking number. • Inform the requester of the expected timeline for a response, any fees, and any potential delays due to the complexity of the request. • Some requests are incredibly broad and will take considerable time and resources. Consider contacting the requestor to help narrow the search if possible. **2. Review and Redaction** • Review the requested records to identify sensitive or confidential information that may be exempt from disclosure. • Work with your attorney to redact exempt information while ensuring the release of all non-exempt information, citing legal justifications for any redactions. **3. Provision of Records** • Provide the requested records in the requested or prescribed format, whether electronic or physical. • Include an explanation of any partial fulfillment or denials, referencing applicable legal statutes. **4. Communication with Requester** • Maintain clear and professional communication throughout the process. • Offer assistance if the requester needs help understanding the different types of records or navigating the process. **5. Documentation and Archiving** • Document the request, response, and any communication with the requester. • Archive all completed requests and related materials for future reference and compliance audits.
Communicating with the Media and the Public	**1. Proactive Communication** • Proactively educating the public and the media on the process of records requests is a good opportunity to "prebunk" any public misconceptions that may exist about the process. This includes engaging with journalists about what may be redacted, and why or how a request can be effectively scoped to suit their needs. • Regularly update the public on the process and availability of public records through official channels, including the office's website, social media, and newsletters. • Consider creating a public records information page on the website, detailing how to submit requests, timelines, and FAQs. **2. Media Inquiries** • Designate a spokesperson to handle all media inquiries related to public records requests. This could be the PIO or designated media officer, if your office has these positions.

Operational Response Template

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Planning Phase	Steps to Consider
	- Provide accurate and timely information, adhering to transparency principles while respecting confidentiality and privacy laws. **3. Public Statements** - When responding to public or media inquiries, provide clear, concise, and consistent information. - Avoid disclosing sensitive details that could compromise the integrity of the elections or the privacy of individuals. Work with your attorney to redact these details if possible. **4. Crisis Communication** - Have a crisis communication plan in place for handling situations involving contentious or high-profile public records requests. - Coordinate with legal counsel and other relevant departments to ensure a unified and legally sound response. **5. Educational Outreach** - Conduct public education campaigns to inform citizens about their rights to access public records and the proper procedures for making requests. - Host informational sessions or webinars to engage with the community and media representatives, fostering a better understanding of the public records process.

Public Records Requests
Social Media Templates

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Here are some generic sample social media posts relating to public records requests. Please note, these sample posts are primarily oriented around informing voters about the documents that are *already publicly available*, to proactively address potential requests and reduce the overhead of such requests.

Keep in mind, these are designed to be a starting point. They can (and should) be adapted to meet your election office's particular need and based on the urgency of the situation. These sample posts may also be used on other platforms you use to reach community members, like Nextdoor. The platforms provided below are just examples.

Issue	Sample Text
Twitter	• DYK? You can read our documented, publicly available, elections process on the [County] Elections Website. In the interest of transparency and building public trust, we also post verified, certified election results precinct by precinct. #elections #PublicRecords [LINK] • Curious about voter registration trends in our jurisdiction? We update our website [weekly] with the latest stats for our area. You can see that, and other public records, here: [LINK]

Facebook/ LinkedIn	• Our elections are safe, secure, and transparent. We make a host of documents and other information publicly available on the [County] elections website.
	
	    There, you can find:
	
	    - Key dates, timelines, and important deadlines
	    - Detailed explainers of how we count, verify, and certify votes
	    - Statistics on voter registration in our jurisdiction
	    - Sample documents and ballots
	    - Other frequently-asked questions!
	
	    🔗 [Insert website link]
	    #ElectionTransparency #PublicRecords #StayInformed #Election2024

Instagram	• We've just added [live voter-registration statistics] to the [County] elections website! See that, and other ways we're making this election transparent, accurate, and responsive at [LINK].

For more examples of social media posts and other sample content, reference the Elections Assistance Commission's "Election Official Social Media Toolkit".

Public Records Requests
Voter-Facing Information Template

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This generic one-pager aims to provide you with a starting point for providing essential information to your voters to help them understand what information is publicly available. Blue text denotes places where jurisdiction specific information is particularly important, though the entire resource is customizable for your jurisdiction. Be sure to consult your jurisdiction's legal counsel where necessary.

Voter Guide
Public Record Requests

YOUR LOGO
ANY COUNTY, USA

Your Right to Information: As a voter, you have the right to access public records related to our elections office. This transparency ensures accountability and helps you stay informed about our operations, decisions, and processes.

What Are Public Records? Public records include documents and information maintained by our office, such as:
- Voter registration data
- Election results and statistics
- Policies and procedures

How to Submit a Public Records Request

Submitting a request for public records is simple. Here's how you can do it:

1. Online: Visit our website at [insert website link] and fill out the Public Records Request form.
2. Email: Send your request with a detailed description of the information you need to [insert email address].
3. Mail: Mail your request to:
   [Your Office Name]
   [Insert Mailing Address]
   [City, State, ZIP]
4. In-Person: You can also submit your request in person at our office:
   [Insert Office Address]
   [Business Hours]s throughout the day.

How a Request is Processed:

1. Acknowledgment: We will acknowledge receipt of your request within [insert timeframe]. You'll receive a tracking number and an estimated timeline for a response.
2. Review and Redaction: Our team will review the requested records, ensuring compliance with legal requirements. Some information may be redacted to protect privacy or sensitive details. If you request paper copies, or if your request requires significant staff time to fulfill, you may be asked to pay a fee to cover these expenses in advance of your request being processed.
3. Response: We aim to fulfill your request promptly. You will receive the documents electronically or in physical format, depending on your preference.
4. Explanation of Redactions: If any part of the records is redacted or withheld, we will provide a clear explanation, citing the relevant legal exemptions.

Why Public Records Matter: Access to public records promotes transparency and accountability in the election process.

By requesting and reviewing these records, you can:

- Understand how decisions are made
- Stay informed about election procedures and outcomes
- Ensure the integrity of the electoral process

Contact Us
For more information or assistance with public records requests, contact:
Public Records Officer [Name] [Phone Number] [Email Address] Website: [Insert Website Link]