



**STATE OF MONTANA  
SECRETARY OF STATE'S OFFICE  
JOB PROFILE AND EVALUATION**

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**SECTION I - Identification**

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**Working Title:**

Election Specialist (HAVA position)

**Department:**

Secretary of State

**Class Code Number:**

131235

**Division/ Bureau:**

Elections and Government Services

**Class Code Title:**

Program Specialist

**Section/ Unit:**

**Pay Band:**

5

**Work Address:**

State Capitol Building, Rm 260  
Helena, MT 59601

**Position Number:** 66027

**Phone:** 406-444-5376

FLSA Exempt

FLSA Non-Exempt

**Profile Completed By:**

Kristin Jacobson, Personnel Officer  
Lisa Kimmet, Elections Deputy

**Work Phone:**

406-444-5988  
406-444-5376

***Work Unit Mission Statement or Functional Description:***

The Secretary of State is one of six executive branch officers originally designated by the Montana Constitution of 1889. The duties of the secretary of state include: interpreting state election laws and overseeing elections; maintaining the official records of the executive branch and the acts of the legislature; reviewing, maintaining, and distributing public-interest records of businesses and nonprofit organizations; filing, publishing, and maintaining administrative rules adopted by state departments, boards and agencies; attesting to the governor's signature on executive orders, proclamations, resolutions, extradition papers, and appointments; preserving the state seal; filing and maintaining records of secured financial transactions, such as liens; serving on the state Board of Land Commissioners and the Board of Examiners; and commissioning notaries public. The Secretary of State's Office is divided into five bureaus: Elections, Business Services, Management Services, Administrative Rules, and Records Management.

The Elections and Government Services Division is responsible for interpreting state election laws and ensuring that they are implemented uniformly throughout the state. The Division also qualifies candidates for the ballot; qualifies initiatives and referendums for the ballot; certifies the language and form of the ballot; publishes the official state voter information pamphlet; conducts the official canvass of election results; and trains local election officials. The Division files and maintains all official acts of the executive and legislative branches of state government, including laws and appointments.

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**Describe the Job's Overall Purpose:**

Responsible for administering elections and administering the Help America Vote Act in Montana (HAVA). The position must know Federal and State election laws, and work to implement and interpret those laws as they relate to the administration of Federal elections. The position is responsible for administering and overseeing Federal and State programs that support election administration.

This position reports directly to the Elections and Government Services Deputy and does not directly supervise other agency personnel.

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**SECTION II - Major Duties or Responsibilities**

**% of Time**

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**A. Help America Vote Act Program Administration and Development**

**50%**

1. Works with the Elections Deputy to propose program goals to achieve agency objectives and legislative intent of the Help America Vote Act of 2002 (HAVA) by assessing statewide HAVA program objectives; evaluating needs of local government elections officials; and analyzing budget, personnel and other resource needs and limitations. Develops program priorities involving assessment of local government needs and capabilities and their potential for HAVA compliance, considering a variety of impacts of proposed projects and rules; and gathering input through training and outreach activities. Coordinates with the Deputy on the formalization of program goals and their incorporation into the broader objectives of the Elections Division and the Secretary of State's Office. Programs include but are not limited to Mock Election, Electronic Absentee System, Voting System Testing and Security and Voting System Certification.
2. Proposes processes and procedures by which local governments can improve compliance with HAVA requirements while maintaining their independence and autonomy. This involves researching practices and programs in other states and evaluating options and alternatives to recommend the overall direction and intent of HAVA projects; evaluating and recommending program priorities by identifying local government needs, Federal Elections Commission requirements, etc.; recommending cost projections and grant funding procedures; and balancing program objectives with HAVA compliance issues.
3. Ensures that the needs of local election officials throughout the state are being addressed and assesses the effectiveness of HAVA programs to ensure statutory requirements and overall program objectives are being met. This involves personal contacts with local election officials, other state agencies, management, and others; clarifying HAVA grant procedures; and developing and implementing new projects or recommending program modifications as necessary. Follows up with election officials statewide to monitor statewide consistency in program administration, and reviews the expenditure of HAVA grant monies and grant monitoring practices. Reports to the Elections Deputy on Montana's progress in implementing HAVA requirements.
4. Evaluates existing HAVA statutes and administrative requirements to identify and develop proposed changes to state law and rules and facilitate the improvement of elections procedures in conjunction with the Elections Deputy and Elections Specialist. This involves gathering input from counties, community organizations, and the public; determining necessary changes in program laws or rules; formulating recommendations for the Elections

Deputy; and compiling justifications and statistics to support proposed legislation or rules for the Deputy.

5. Reviews past and current HAVA grants to counties to verify that spending is appropriate and recommends action by the Election Deputy if spending is outside appropriate limits. Administers, with the Elections Deputy, the ongoing grant process to distribute HAVA funds within the state.
6. Proposes standards, documentation and requirements of HAVA grantees, recommends approval of the use of grant funds, determines the federal, state and SOS grant requirements, creates grant documentation and contracts, outreach and marketing activities, processes applications and determines successful applicants, distributes grant funds and monitors compliance with requirements.
7. Compiles a variety of reports and summaries related to HAVA financial information, budget projections, and narratives for final review by the Elections Deputy. In part, this involves working with the Federal Election Commission to determine appropriate matching and maintenance of effort information.
8. Provides information for the preparation of biennial budgets by reviewing program allocations and expenditures, program goals and objectives, and related personnel and other administrative expenses. This involves identifying major issues pertinent to program compliance and performance, and related factors to ensure efficient and cost-effective program operations. Monitors program compliance with federal, state and other laws, rules, regulations and policies by reviewing current policies and practices in relation to state and federal mandates and applicable legislation and mission mandates. Assists the Elections Deputy in developing and allocating work unit budget for HAVA expenditures and to monitor budget projections as well as performance indicators to ensure program efficiency.
9. In the absence of or at the direction of the Elections Deputy, represents the Elections Division on a variety of HAVA program related issues by preparing and presenting effective verbal and written presentations on activities to other agencies, county officials and community organizations on topics relevant to HAVA program operations, practices and goals.

**B. Voting for Military and Overseas Citizens 10%**

1. Oversees Division projects with regard to election activity for voters covered under the Uniformed and Overseas Citizens Absentee Voting Act (UOCAVA), including development of plans for technical tools to assist voters with registering and casting a ballot.
2. Administers support to voters covered under UOCAVA by knowing state and federal laws and assisting those voters with questions and directing them to available resources.
3. Works with the Federal Voting Assistance Program (FVAP) on programs and projects for facilitating election activity by covered voters.
4. Creates training materials and conducts training for county election officials and for covered voters.

**C. Voter Education and Outreach 10%**

1. Develops educational materials and training for HAVA program policies and procedures. This involves assessing training needs through review of program requirements and through feedback from others, including providing direction and guidance in the interpretation and application of program laws and rules, defining the roles and responsibilities of various entities, and developing training curricula and schedules.

2. Provides problem-solving assistance to county election officials, other agencies and the public on program issues, interpretations, clarification on procedures and requirements, and determining new ways to improve compliance (e.g. provisional balloting, polling place notices, AutoMARK and other voting system set up and availability, etc.). This involves review of applicable laws, rules, and voting systems, assessing program precedents in similar situations, reviewing recommendations from others, and determining implications of program activities.
3. Presents information through formal and informal presentations to interested groups on HAVA topics such as voting systems, accessibility, provisional balloting, and ID requirements. This involves developing presentation materials, conducting research on relevant topics and issues, and conducting follow up activities applicable to the audience. Conducts voter education outreach efforts and any youth voting activities covered under HAVA. Conducts public events and meetings, and disseminates notices such as public service announcements.
4. Serves as liaison with other state, federal and community organizations to provide education and outreach, and the development of cooperative agreements related to HAVA for the purpose of resolving program conflicts or problems and to ensure program policies and practices are working to achieve program objectives.
5. Trains election officials on HAVA requirements including voting systems, Unity Online, provisional voting, identification, and related topics.

**D. Project Monitoring and Technical Assistance**

**20%**

1. Administers the HAVA goal of improving polling place accessibility. Develops recommendations, conducts research and gathers information and statistics to support recommendations, and works collaboratively with others to support HAVA polling place accessibility objectives.
2. Administers, in conjunction with the Elections Deputy, events related to certification of voting systems, review of past voting system testing and certifications.
3. Monitors HAVA-related contracted services to ensure the overall quality, compliance and cost-effectiveness of services. This involves monitoring bidding and selection procedures, reviewing contracted activities and expenditures, resolving difficult problems related to contracts, and collaborating with contracted trainers or training coordinators on training issues and plans.
4. In conjunction with the Elections Deputy, examines and recommends approval or disapproval of voting systems used throughout the state. Proposes and recommends laws and rules regarding procedures and practices related to: performance certification; how electors ensure proper disposition of a ballot; process to be used to prepare for a vote count; addressing discrepancies in vote counts; operating and testing voting systems during counts or recounts; ensuring security measures necessary to secure voting systems before, during and after an election; and testing and certification of systems pursuant to state law.
5. Administers planning, scheduling and conducting testing of voting machines used in elections across the state. Analyzes system problems and recommends solutions; provides maintenance and related services to elections officials on an as-needed basis.

**E. Other duties**

**10%**

This position performs a variety of professional and administrative duties in support of ongoing Division and agency operations. This includes providing back up duties for other Elections staff, coordinating special projects, attending meetings and conferences, representing the Elections Division, and participating in ongoing training and educational programs as directed.

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**2. *Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:***

Problems and decisions relate to monitoring programs to provide funds to counties through the grant administration process, to assist counties in implementing HAVA programs, to encourage uniformity in interpreting HAVA guidelines and requirements, and to assist local election officials in maintaining compliance with elections laws. This position utilizes state and federal laws, legal interpretations, and a variety of HAVA rules, requirements and guidelines.

**3. *The most complicated aspect of this position is:***

The most complicated part of the job involves monitoring HAVA program effectiveness on a statewide basis, reviewing HAVA rules and requirements, reviewing and interpreting federal and state laws for elections, creating plans for technical tools, and addressing the wide variety of needs and capabilities of local elections offices across Montana.

**4. *Guidelines, manuals, or written procedures that support this position include:***

Available guidelines, manuals, and written procedures available to the incumbent include: ARM, MCA, SOS policies and procedures, federal laws and HAVA requirements and guidelines.

**5. *Which of the duties and/or specific tasks listed under 1. (above) are considered "essential functions" that must be performed by this position (with or without accommodations)?***

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

**Duty A:**

**Program Development and Implementation**

**Duty B:**

**Voting for Military and Overseas Citizens**

**Duty D:**

**Project Monitoring and Technical Assistance**

The following mental and physical demands are associated with these essential functions:

**PHYSICAL**

- Lifting (30 - 40 lbs. )
- Carry light items (training materials, booth set up equipment, books, papers, etc.)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Travel within the state to project locations
- Operating a personal computer and peripheral resources
- Communicate in writing, in person, and over the phone

**MENTAL**

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet deadlines
- Computing arithmetic operations
- Comparing data
- Compiling information
- Analyzing, Synthesizing
- Coordinating
- Negotiating
- Instructing

6. **Does this position supervise others?**     Yes     No

**Number directly supervised:**  
**Complexity level of the positions supervised:**  
**Position Number(s) of those supervised:**

7. **This position is responsible for:**

- |   |                                 |                                      |                                     |
|---|---------------------------------|--------------------------------------|-------------------------------------|
| <input type="checkbox"/> Hiring                 | <input type="checkbox"/> Firing | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level  |
| <input type="checkbox"/> Performance Management |                                 | <input type="checkbox"/> Promotions  | <input type="checkbox"/> Discipline |
| <input type="checkbox"/> Other:                 |                                 |                                      |                                     |

8. **Attach an Organizational Chart.**

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***SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.***

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**Critical knowledge and skills required for this position:**

**KNOWLEDGE:**

This position requires considerable knowledge of the principles and practices of program administration; the statutes, rules, policies, regulations and procedures pertaining to elections and HAVA; legislative processes and procedures; participants occupying principal positions in state elections processes; elected officials/offices statewide; legal terminology, and statutory and regulatory language; legislative and administrative processes; administrative rules and statutory reporting requirements; business writing; computer software applications, including word processing, spreadsheets and databases; publication design; federal grant administration procedures and requirements; and training methods and procedures.

**SKILLS:**

This position requires skills in conducting research; interpreting data and statistics; communicating with a wide variety of individuals; organizing and delivering training and presentations; the operation of general office equipment; program planning and monitoring; technical writing and proofreading; public relations; and organizing and prioritizing work.

**Behaviors required performing these duties:**

- **Verbal Communication:** Keeps appropriate individuals informed. Listens to others respectfully, understands or seeks clarification, and responds appropriately demonstrating tact and diplomacy. Expresses thoughts and ideas clearly.
- **Written Communication:** Writes clearly, logically and effectively using proper style, tone, grammar, spelling and punctuation.
- **Flexible at Work:** Responds positively to changes in direction, priorities, responsibilities, personnel or assignments. Works effectively in a variety of situations and with a variety of individuals or groups.
- **Working with Others:** Relates to others in an open and accepting manner; is approachable. Offers and accepts opinions constructively. Adjusts to how individuals and the work unit will react. Treats others with respect. Constructively resolves disagreements. Is open to others' ideas and gives credit and recognition to others.
- **Responsive to Work Needs:** Willing to perform different jobs, cross train, or assist wherever needed. Is aware of co-worker workload and responds accordingly.
- **Takes Action:** Takes effective and appropriate action to perform job duties without being reminded. Willingly accepts more responsibility or more work.
- **Forward Looking:** Suggests improvements and new ideas, technologies, and approaches. Willingly applies new and evolving ideas, methods, designs and technologies to work.
- **Efficiency and Focus:** Uses time effectively and prioritizes tasks. Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks. Handles interruptions or distractions and stays on task. Achieves goals.
- **Accuracy:** Ensures accuracy of work and makes corrections in a timely manner. Is conscientious and monitors own quality of work.
- **Attendance:** Arrives on time for work and demonstrates good attendance record.
- **Organizational Awareness:** Understands and follows the rules, policies and laws that govern work. Identifies key decision-makers; understands and respects the balance of authority. Acts in an ethical manner.

**Education:**

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- |   |  |
|---|--|
| <input type="checkbox"/> No education required                | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent    | <input checked="" type="checkbox"/> Related Bachelor's Degree            |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree                         |

**Please specify the acceptable and related fields of study:**

Public Administration, Finance, Paralegal, Business Administration, Political Science or related area.

**Required/Acceptable:**

**Related:**

**Other education, training, certification, or licensing required (specify):** None Specified

**Experience:**

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

No prior experience required  
X 1 to 2 years

3 to 4 years  
 5 or more years

**Other specific experience (optional):** Election Administration experience preferred, in addition to experience working with voting equipment and personal computers.

**Alternative Qualifications:**

This agency will accept alternative methods of obtaining necessary qualifications.

X Yes  No

***Alternative qualifications include:***

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***SECTION IV – Other Important Job Information***

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Work is performed in a normal office environment, and the position requires the ability to communicate effectively in person, in writing, and over the phone. Work hours vary in complying with numerous deadlines, customer requests, interruptions, and wide fluctuations in work volumes, and deadlines require the employee to be able to work under pressure for long periods of time.

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**SECTION V – Signatures**

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My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

**Employee:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Immediate Supervisor:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Deputy:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Department Designee:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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