



**OPERATION** BLACK **VOTE** CANADA

**“SEAT AT THE TABLE”**

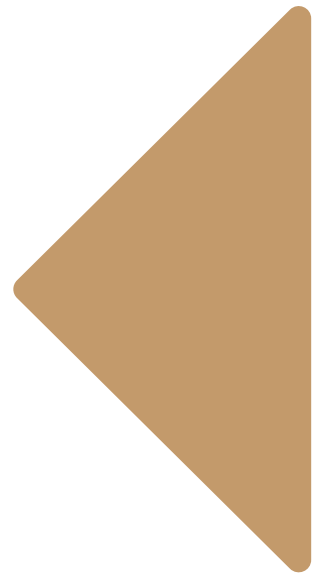
**A CAMPAIGN  
TOOLKIT**

**TO SUPPORT  
BLACK WOMEN  
IN MUNICIPAL ELECTIONS**



# ACKNOWLEDGMENT

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<b>Section 3.</b>	<b>4</b>
<b>Why run?</b>	<b>4</b>
<b>Testimonials</b>	<b>5</b>
<b>Considerations before you run for office</b>	<b>7</b>
<b>Building your team</b>	<b>15</b>
<b>The Nomination Process</b>	<b>21</b>
<b>Campaign Finances</b>	<b>27</b>
<b>Tax Credits</b>	<b>37</b>
<b>Donor/Donation Database (Sample)</b>	<b>37</b>
<b>Communicating Your Message</b>	<b>38</b>
<b>Different Types of Communication Materials</b>	<b>38</b>
<b>Writing your Biography</b>	<b>42</b>
<b>Campaign Website and Campaign Email</b>	<b>44</b>
<b>Campaign Social Media Accounts and Engagement</b>	<b>46</b>
<b>Preparing for debates</b>	<b>47</b>
<b>Engaging with the media</b>	<b>51</b>
<b>Door Knocking</b>	<b>55</b>
<b>Telephone canvassing</b>	<b>58</b>
<b>Campaign Signs</b>	<b>60</b>
<b>Writing Two Speeches: Your Concession and Victory Speech</b>	<b>62</b>
<b>Election Day</b>	<b>63</b>
<b>Get Out the Vote! (GOTV)</b>	<b>63</b>
<b>Preparing for Election Day (E-Day)</b>	<b>66</b>
<b>What Happens on E-Day?</b>	<b>67</b>
<b>E-Day Home Centres</b>	<b>69</b>
<b>Scrutineering</b>	<b>71</b>
<b>After the Election</b>	<b>75</b>
<b>Logistics After the Election and Campaign</b>	<b>75</b>

## SECTION 3.

### Campaigning tools and **worksheets**

## WHY RUN?

### Why it's important

Operation Black Vote Canada strongly believes representation matters! However, representation is the floor and not the ceiling when it comes to having more diverse voices at decision-making tables at all levels of government.

Studies have shown that diversity improves an organization's effectiveness. From a governance perspective, municipal councils are effective ways of directly shaping a community, as municipalities are responsible for a wide range of services, policies and programs. With the exception of Quebec and parts of BC, the majority of municipalities do not have a party system. Therefore, councillors answer directly to their residents and not to a party, as they do provincially and federally.

In councils with more women, especially Black women, there can be more perspectives and viewpoints discussed. It is also critical for councils to better reflect the needs of their communities. In order to make better decisions for everyone, leadership groups with diverse opinions, backgrounds and lived experiences are crucial.

As such, it is imperative that Black women run for elected office. Cultural background and lived experience inform policy decisions. Our absence contributed to a narrowing of perspectives and solutions among politicians and decision makers.

Black women are already doing the work of elected officials by working and volunteering in their communities. Black women lead advocacy and assist those who are unable to access adequate services.

Furthermore, Black women have been at the forefront of change in our communities, cities and provinces. We speak out and do the work by bringing attention to, supporting and offering solutions to issues that not only affect Black communities but all communities.

As part of our toolkit, we have provided an argument to recognize the importance of diversity in decision-making bodies. We have described the good, the bad and the challenges of running and being elected. Lastly, we have provided information to help you start your campaign starting today.

We have included the good, the bad, and the challenges so you can approach this with an open mind. This is not intended to discourage you from running. Our goal is to equip you with the foreknowledge so that you can surmount barriers and overcome challenges you may face ahead on the campaign trail. Our goal is for you to run and win. We encourage you to try again and again even if you don't succeed the first time.

The United Nations has found that women should hold at least 30% of elected seats in a government to reflect women's concerns. So, we say "run in packs"...bring along other Black women on the journey with you, whether they are running or supporting you as part of your "kitchen cabinet." They will be your posse as you challenge the status quo of what elected officials look like.

**Ultimately, we need you.** The community needs you. Our political system needs you.

The incumbent rule is well known. Those who hold seats raise more funds, have name recognition and past experience. Since more men than women have won elected positions, incumbents will have the advantage of staying in office. That can make it more challenging for women, particularly Black women to win seats. However, we know that Black women are electable given the proper resources and support. As evidenced by the 2022 Ontario Municipal elections, racialized people, especially women, won in wards with no incumbent. But there is hope. We also saw a Black woman, Amber Morley, defeat a 19-year incumbent.

**So, IT IS POSSIBLE!**

We need to normalize Black woman leadership, in particular Black women in political leadership..

**We need you to run for elected office and take our seat at the table!**

Operation Black Vote is here to support you with this toolkit and our other programs such as the **“Seat at the Table”** workshops and our municipal bootcamps. We hope to see you at one of these initiatives in the future, and we hope this toolkit can support your campaign endeavours.



**Velma Morgan**  
Chair  
Operation Black Vote Canada



## TESTIMONIALS

I loved the program and found it incredibly **helpful**. The insight and **knowledge** we received helped me run a **successful campaign**. It also helped to give me the **confidence** I needed to run. One of the highlights of the program was having Black elected officials speak to us about the realities of the role from a **Black lived experience**.

**Councillor Colleen James Regional  
Councillor  
Region of Waterloo**

## CONSIDERATIONS BEFORE YOU RUN FOR OFFICE

### ARE YOU ACTIVE IN YOUR COMMUNITY?

You don't have to wait until you become a candidate to share your perspectives and support the causes that make a difference in the life of your community. If you are reading this, you probably are engaged in some type of community organization or issue in our community. Remember, women, particularly Black women because of their intersectionality, bring unique political perspectives because of their engagement with their environments and life experiences, which differ from what we are accustomed to in government.

There are many opportunities for you to participate actively in the civic life of your community. Here are some examples of how you can be more involved and express your points of view to the benefit of those around you:

#### **Volunteer!**

Volunteering is a community service that allows you to connect with your community and make it a better place by lending your skills and your time to organizations and causes that you believe in. You can volunteer with local, regional, or national causes – look for volunteer opportunities that are useful for the organization and that match your interests and skill set.

Here's a resource to look for volunteering opportunities from Volunteer Canada (2022):

[I Want to Volunteer](#)

#### **Submit a deputation.**

A deputation is a brief written or verbal presentation made by an individual, a group, or a representative of a larger group in a formal procedure such as City Council meetings. Deputations are made regarding particular issues being discussed by decision-makers.

Here is a helpful overview of the deputation process by the Toronto Youth Policy Council:

[How to Present an Effective Deputation](#)

#### **Write and publish an Op-ed.**

An Op-ed, which stands for "Opposite the editorial page, is a "piece of writing that expresses a personal opinion and is usually printed in a newspaper opposite to the page on which the editorial is printed". An Op-ed is an effective way to introduce your views to a larger audience and establish yourself as a thought leader in the community.

McGill University has very good tips for how you can start writing your first publication:

[Op-Ed Writing Tips](#)

## Engage your audience and share your thoughts

Continue to engage in your community by writing letters to the editor of your local newspaper or to elected representatives of all levels of government. Social media posts present another way to share your thoughts and engage your target audience. Similarly, find opportunities to be a guest speaker at community events, workshops, or conferences.

Here are some suggestions of resources you can review: [CAWI's Civic Engagement Kit](#) and Community Waitakere's [Getting your voice heard](#)

## Find opportunities to lead.

Continue to develop your leadership skills and establish your reputation as a trusted leader in the community. There are no shortage of ways to serve – explore opportunities to lead on committees, boards, feminist groups or organizations, political campaigns, service clubs, school councils and parent-teacher associations, cultural, ethnic and language associations, faith-based bodies, business organizations and government Agencies, Boards and Commissions.

Here are some sources to support your leadership: Sunny Samanta's [10 Qualities for Community Leaders](#) and Employment and Social Development Canada's [Guide to Exemplary Practices in Community Leadership](#)

To get some inspiration and ideas, here are some examples of how Black women candidates were involved in their communities:

**Gracia Kasoki Katahwa**, Mayor-elect of the Côte-des-Neiges-Notre-Dame-de-Grâce borough, the first black woman to hold this position, went on to join the Board of Directors of the Order of Nurses in 2018.<sup>44</sup>

**Olive Kamanyana**, elected municipal councillor for the Carrefour-de-l'Hôpital district, Gatineau, is the founding president of the Association des résidents du quartier du Carrefour-de-l'Hôpital, a member of the Coordinating Committee of the Collectif des associations des résidents de Gatineau<sup>45</sup>

**Yvette Yende-Ashiri**, a candidate in the Orléans-South-Navan Ward, Ottawa is involved in various Boards of Directors, School Boards, Community Resource Centres<sup>46</sup>

**Jocelyne Frédéric-Gauthier**, re-elected City Councillor in the Auteuil district (Laval), is the President of the Société de transport de Laval (STL) and participated in the launching the work on STL's electric buses<sup>47</sup>




**What are some activities or groups that you can join to be more active within your community?**

# EXPERIENCE AND NETWORK<sup>48</sup>

## SELF-ASSESSMENT

Running as an elected official is just one way to serve your community. Most individuals who are interested in public office have been actively serving in various capacities from their local food banks to community boards. Take this self-assessment to reflect on your current and past community service.

 Have you been involved with the following community organizations or initiatives?	No, not yet	Yes, in the past	Yes, I'm currently involved	Name of organization	Your role	When?
Corporate boards						
Not-for-profit, community, or charity boards						
Community centres						
A community project						
An organization that provides a social service such as a food bank or a youth mentoring program						
Neighbourhood groups or associations						
Parent Advisory Councils						
Business Organizations						
A union or labour organization						
A church, mosque, synagogue, temple or faith-based group						
Participated in a community special event or festival						
A sports or recreation team						

Add other types of organizations here:

 Community organizations or initiatives	No, not yet	Yes, in the past	Yes, I'm currently involved	Name of organization	Your role	When?



**What are some of your reflections after looking at all the areas and organizations that you've been involved with in the past? What patterns do you see?**



**Are there other areas or organizations that you want to build connections to as a result of reviewing your past and current involvement in the community? What can be your next steps to pursue these new connections?**

## FINANCIAL READINESS ASSESSMENT

Before submitting your nomination papers, it is vital to assess your financial readiness to undertake an election campaign. Don't worry – the outcome isn't about excluding people from running based on your personal financial standing; you are not required to have a certain level of income in order to run as a candidate.

There are two main reasons to conduct this review of your personal finances and financial readiness: the first is to ensure you are up to date on your taxes and any outstanding debts to the local government. In some areas, such as Nova Scotia, candidates are required to obtain a certificate from their municipality, even if they do not owe taxes or own property, as proof of this.<sup>49</sup> The second is to determine your ability to cover some campaign expenses yourself.<sup>50</sup> Over the course of the election campaign there are often costs that the candidate must cover personally; consider your campaign expenses and budget, and what percentage you would be able to cover. There is no right or wrong answer to this, but this is a useful way to reflect on and plan ahead for things that could arise over the course of your run.

When assessing your financial readiness, it is important to look at your projected campaign expenses and budget (see section 2.13). Based on your projected expenses, you can determine what is the minimum amount you need to raise to run a successful campaign and what costs you can personally cover if needed. Establishing the minimum amount of funds needed will help in the development of a financial action plan to lay out exactly how and from where you will obtain the funds needed to run your campaign (see section 2.14) such as creating a list of potential contributors and developing fundraiser ideas.

As campaign rules regarding finances and fundraising can be quite specific and strict, consider checking if your municipal government has a candidates' guide specifically about campaign financing or a general candidates' guide to help you familiarise yourself with these rules.



## ARRANGEMENTS WITH YOUR CURRENT EMPLOYER

A major consideration prior to seeking nomination is the situation surrounding your current employment. It's important to check specific rules that pertain to your jurisdiction by checking nomination rules and requirements, as well as policies that govern your specific occupation.

For example, in Ontario, municipal employees must take a leave of absence that begins the day that they are nominated and, if they are elected, must resign from their job ([Government of Ontario, 2022](#)).

Ontario legislation also clearly states people who cannot be elected to municipal office including:

- **Any person who is not eligible to vote in the municipality,**
- **A municipal employee who has not taken an unpaid leave of absence or resigned,**
- **A judge of any court,**
- **An MP, MPP or senator, or**
- **An inmate serving a sentence in a penal or correctional institution. (Ibid., p. 3).**

Some employers will require a request for permission from the prospective candidate before granting a leave of absence. This is the case for federal government employees, who must submit a request for permission to the Public Service Commission of Canada before they can take leave and participate in the election as a candidate.

There may be circumstances where the only option is to resign from the position, in which case proof of resignation may be required to continue with the nomination process.

### **Check with your municipality for more specific information.**

Ensure that you are able to make arrangements with your current employer, and reflect on the implications this decision will have on your finances. Talk with your Human Resources representative or your union, where applicable, and consult the local nomination rules to ensure that you have sufficient time to complete all the necessary forms from both your employer and the municipality.



## CREATING A CARE PLAN FOR YOUR FAMILY

Even in a progressive country like Canada, there remains a general expectation as to who provides care in society. According to [Statistics Canada \(2022\)](#):

In 2022, more than half of women aged 15 and older (52% or almost 8.4 million women) provided some form of care to children and care-dependent adults, whether paid or unpaid. Regardless of whether they cared for children or adults, women were significantly more likely than men (42%) to provide care.

[Thomas and Bittner \(2017\)](#), authors of the seminal book, *Mothers and Others: The Role of Parenthood in Politics*, lay out the challenges that women in politics face either as mothers or a woman without children. They found that:

While it is not news that men are more likely than women to be MPs, what is less known is that men MPs are considerably more likely to be fathers, to have more children than women MPs, and to enter politics when their children are younger... (However), the evidence leads us to conclude that women who seek political careers continue to face a motherhood penalty that fathers do not.

Women considering entering political leadership need to not only create a plan to care for their families during the campaign and once they are elected, but they also need to consider the necessary messages to counter gender norms that persist in society. Instead of being at a disadvantage, embracing and talking about their families, women in politics can connect with voters using their personal experiences as mothers and caregivers.

[Thomas and Bittner \(2017\)](#) found that motherhood in politics is not always covered negatively in the media. For example, during the 2008 US presidential election, “most of the media coverage of Hillary Clinton’s and Sarah Palin’s (grand)parental status was positive. In Latin America and the United States, women in politics who use their maternity to position themselves as national caregivers, dedicated to taking care of the country, typically do well in electoral politics” (Ibid.).

## **Families are involved during the campaign, so what are some of the ways that women candidates can create a care plan for their families?**

Writing for the U.S.-based National Democratic Training Committee, Dale Dorlin (2021) wrote reflections about [Running for Office With a Family](#).

Dorin highlighted that family is a source of strength during a potentially tough season of life on the campaign trail. Securing your family's support and buy-in is also important, especially with regard to your immediate family. It's also important to be personally aware of the varying levels of involvement and support by family members, especially relatives that may not share the same political views as you. At the end of the day, it's important to rally together as a family, and also consider a plan on how you can come together to help on the home front, especially with caring for one another during this time. Remember there is no such thing as balance work and family 50/50. When you are with your family you must give them your 100% and when at work you need to give work your 100%. This takes a lot of organizing on your end.

Here are some more suggestions on how to create a plan for your family as you consider running for election:

### **Self-care**

Take care of yourself. You will only be able to take care of others if you are in a good place, physically and mentally. Exercise, meditate, eat healthy, get sufficient sleep and water, engage in recreation, take breaks, and breathe! It is also okay to just say "no"!

### **Schedule family time**

Book family time on your calendar. When possible, ensure that there are no interruptions during this dedicated time, including no electronic devices. Be fully present in the moment with your family and do something together to reconnect.

### **Get help**

Be open and proactive to receiving help from family, friends, and your larger community may it be with regards to childcare or looking after your home or pets. Don't be afraid to share what you need with those around you that you trust to share these home responsibilities with.

### **Keep your privacy**

Boundaries, though hard, are not impossible. Discuss and set your family's boundaries concerning media exposure, including photo opportunities and social media. Ensure you have a communications team member who is also there to support your family during this time so that they are not caught off guard. Create official campaign social media pages outside of your personal accounts. Do the same for emails as well. Update the privacy restrictions of your family members' accounts, if possible.

## Be yourself

Give yourself permission to embrace your strengths and vulnerabilities and trust your instincts and judgement. You know best how to care for your loved ones, and your authenticity will captivate the hearts of voters.



**Reflect on what you and your family need as you consider running for elected office.**

### NOTES :

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## **BUILDING YOUR CAMPAIGN TEAM**

Running a campaign requires teamwork. It's important to have as many of your core team in place before starting your campaign, at least six months before election day. Your core team is there for you and your success. They will give strategic advice and lead different aspects of the campaign. Consider people that you trust fully, and people that are willing to put in the work. They are there to balance your strengths, fill gaps and activate volunteers and voters to get you elected. It is important to select not only the right people for the task or role but also the right people for the team.

Remember, a diverse team will enrich your campaign. It gives the campaign the depth it needs in terms of perspective, representation, and access to different communities within your constituency.

In addition to your public campaign team, you should have what is called your "kitchen cabinet". This is a small group of people who you trust to tell you the good, the bad and the ugly. This group should be small (3-5 people). However, they are your trusted confidant who you can speak to about any and everything. They are separate from the campaign team, but could also part of the team.

Depending on your experience and style, consider the following traits and roles as you build your campaign team (see table below). Note as well that you can certainly adjust the titles and the number of team members you need depending on the size and approach of your campaign. However, it is critical that you at least have a campaign manager and a chief financial officer (CFO – also known as your campaign's official agent) (Elections Ontario, 2023). Please note that two roles should be held by people you trust!


If you are able, you should also recruit a volunteer to serve as your primary communications advisor.



Some traits to seek when building a campaign team	Potential campaign team members needed
<ul style="list-style-type: none"> <li>○ Trustworthy</li> <li>○ Transparent</li> <li>○ Accountable</li> <li>○ Respectful</li> <li>○ Organized</li> <li>○ Team player</li> <li>○ Strategic</li> <li>○ Focused</li> <li>○ Creative</li> <li>○ Experienced</li> <li>○ Commitment</li> <li>○ Flexible</li> </ul>	<ul style="list-style-type: none"> <li>○ Campaign Manager</li> <li>○ Chief Financial Officer</li> <li>○ Communications Advisor/Director Legal</li> <li>○ Advisor</li> <li>○ Fundraising Coordinator</li> <li>○ Volunteer Coordinator</li> <li>○ Event Coordinator</li> <li>○ Office Manager</li> <li>○ Personal Assistant</li> <li>○ Community Liaison</li> <li>○ Advertising/Marketing Director</li> <li>○ Polling and Public Relations Advisor</li> <li>○ Speechwriter</li> <li>○ Sign Coordinator</li> <li>○ Spokesperson</li> <li>○ Press Secretary</li> <li>○ Social Media Coordinator</li> </ul>



**Thinking about your core campaign team members, what traits are most important for you? Reflect on why these characteristics are important.**

 What are some of your strengths or weaknesses?	What characteristics or traits do you need on your team to compliment you?	Write some names down of people in your community who have these traits and skills that you need to be on your team.



## CAMPAIGN TEAM ROLES AND DESCRIPTIONS

You can consider the various roles and responsibilities as you build your campaign team. Remember, you will have to decide the size of your core team and how many volunteers the campaign will need to reach voters.

For smaller campaigns, having at least a campaign manager and a chief financial officer to help you strategically plan, implement, and finance your campaign.

You can consider the various roles and responsibilities as you build your campaign team. Remember, you will have to decide the size of your core team and how many volunteers the campaign will need to reach voters.

For smaller campaigns, having at least a campaign manager and a chief financial officer to help you strategically plan, implement, and finance your campaign.

The different campaign team positions and their roles and responsibilities are outlined below:

Campaign Team Position	Responsibilities	Is this a role you hope to have as part of your team?
Campaign Manager**	Ensures that the candidate's vision and goals are achieved during the campaign. This requires a significant commitment and can be a full-time job. It starts prior to the campaign and continues throughout its duration.	
Chief Financial Officer**	Ensures that the campaign's financial reporting obligations are in order. They are in charge of tracking campaign expenses and revenues, and completing financial forms required by the municipality.	
Communications Director/Advisor	Oversees the communications of the campaign, which will include the development of the overall campaign messaging including the platform, and managing of various communication tools/approaches such as the campaign website, social media accounts, brochures and mail outs. This role also provides support in creating speaking notes for speeches, sending out press releases, arranging for media opportunities, and preparing the candidate for the debate.	
Volunteer Coordinator	Recruits and onboards campaign volunteers which includes welcoming them, providing training, scheduling, and maintaining the volunteer database. They are also the main contact person that volunteers can reach out to during the campaign duration and assign tasks accordingly.	

Fundraising chair	Creates and implements the fundraising plan to raise financial support for the campaign. This can include private sponsorship from individuals to organizing events such as dinners and events with the candidate.	
Signs coordinator	Ensures that signs are distributed throughout the constituency. This includes monitoring inventory, locations, coordinating the drop off and installation of signs, replacing damaged or broken signs, and clean up after the campaign.	
Elections day chair / GOTV Director	Plans, implements, and coordinates Election Day. This includes ensuring that voters supportive of your candidate get to the poll and vote. Election Day also includes phone calls to remind supporters to go to the polls, help them find their polls, provide rides to supportive voters, assign volunteers at the different polls especially during the counting of the votes, and tracking the numbers as they come in.	



**Use the following table, and write potential names who can be a member of your campaign team:**

Role	Name	Contact information
Campaign Manager		
Chief Financial Officer		





## RECRUITING VOLUNTEERS

From the moment you begin inviting people to be part of your nomination team or campaign, you have begun recruiting volunteers. How did you do it? You probably thought about family and friends in your closest circle and invited them to support you. But for your campaign, you will need to expand your circle. In the beginning, you may need to be the one inviting people to join your team to contribute their talents, skills, and time to the campaign. However, as the campaign intensifies, it is a good idea to have your campaign manager or volunteer coordinator recruit, onboard, train, and work with volunteers and assign specific tasks to them. Remember having a diverse team will assist you in reaching different communities. Here are ten tips for recruiting volunteers to your campaign: <sup>52</sup>

### Tips To Recruit Volunteers for Political Campaigns

- Identify the campaign goals and objectives. Communicate, inspire and invite others to support you and your vision for your community.
- Determine your campaign strategy and what skills and volunteer roles are needed to help implement this strategy into reality
- Establish clear expectations for volunteers and make it easy to engage
- Provide volunteering options that they can choose from, including roles, tasks, days, dates, and times. Give options that they can do alone or with a team in person or online or from home, at the campaign office, or in the community.
- Reach out to community organizations, political parties, and post-secondary institutions including political science classes
- Create a volunteer page on your campaign website. Take advantage of your online communication, using social media platforms that can be linked back to your website.
- Allow volunteers to connect in person or online. Connect potential volunteers to the campaign's volunteer coordinator or welcoming committee.
- Send emails to people who have signed up for your email list and give them the opportunity to volunteer.
- Build community and loyalty so that they will continue to volunteer until the end. Make it fun!
- Create and build a volunteer database. Use this list to contact and ask people directly as the candidate. Ask supporters from canvassing to volunteer.

# VOLUNTEER DATABASE (SAMPLE FORM)

HERE'S AN EXAMPLE OF A TEMPLATE YOU CAN USE TO  
CREATE YOUR VOLUNTEER DATABASE:

ID	Name	Email	Phone	Best way to reach them?	Do they live in the ward? (Yes or No)	If yes: Do they need a lawn sign?	If yes: Have they voted in the advanced poll?	Has the candidate called or spoken with them?	Volunteer areas?	When can they volunteer?	Can they volunteer during elections day?	Additional Notes
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## THE NOMINATION PROCESS

### NOMINATION REQUIREMENTS

However, some nomination requirements are generally standard across Canada, such as that candidates must be:

- 18 years of age or older on general voting day,
- A Canadian citizen,
- Have been a resident of the electoral district/municipality for the required amount of time specified by the municipality or provincial requirements (generally between six to twelve consecutive months prior to submitting nomination papers, see local requirements)
- Eligible to vote, and
- Have not been disqualified under other legislation.<sup>53</sup>

In addition to national nomination requirements, municipalities may establish further requirements, and these will differ from municipality to municipality. As such, it's important to refer to the exact requirements set out by your municipality on its website. It may also be helpful to speak with someone from the municipality, such as the clerk, or attend any information sessions or workshops offered by the municipality and not-for-profit organizations supporting elections.



## FINANCIAL CONSIDERATIONS DURING NOMINATIONS

The financial statement (also known as a financial disclosure) is a mandatory component of the nomination process and will be available to the public.<sup>56</sup> Failure to submit proper financial statements may result in being prohibited from running for or being appointed to the municipal office until after the next election.<sup>57</sup> This financial statement must be submitted with the prospective candidate's nomination papers, using the prescribed form provided by your local government. Using British Columbia's Financial Disclosure Act as an example, the financial statement should include (but is not limited to) the following:

- **Any business that is located and/or operates in [the municipality] that the prospective candidate owns (in part or in full), is a trustee of or partner in and has been financially remunerated for.**
- **Any business that is located and/or operates in [the municipality] that the prospective candidate has been financially compensated for services performed as an employee.**
- **Any business that is located and/or operates in [the municipality] that the prospective candidate has been financially remunerated by for an office held that is not already listed.**
- **Any corporation in which the prospective candidate or a trustee for that person holds one or more shares.**
- **The creditor(s) for any debt(s) held by the prospective candidate.**
- **The location and description of any land that is located in [the municipality] that the prospective candidate or a trustee for that person owns an interest in or has an agreement which entitles them to acquire an interest.**<sup>58</sup>

## THE NOMINATION PROCESS

In general, the nomination process follows the following steps:

1. Ensure you meet nomination requirements (see Section 2.10)
2. Complete the nomination papers (available at the local government website or office)
3. Submit the following completed documents to the City Clerk:
  - a. Nomination papers
  - b. Endorsement signatures (See 2.10.4)
  - c. Financial statement (this requirement varies by municipality)
  - d. Public disclosure (this requirement varies by municipality)
4. Pay the nomination fee (the fee varies by municipality)



## ENDORSEMENT SIGNATURES DURING NOMINATIONS

Note that endorsement signatures are not a requirement in every municipality. For example, in Ontario municipalities with 4,000 or fewer voters, the nomination process does not require candidates to submit endorsement signatures.<sup>59</sup>

However, in municipalities where endorsement signatures are required, all signatories must be eligible voters on the day the endorsement is signed, and not by election day. In other words, candidates must ensure that all signing in support of their candidacy are of voting age on the day they sign your nomination papers.

If endorsement signatures are required, it is good practice to have extra signatures in case any of the signatures you collected are challenged and disqualified. For example, in Ontario municipalities with more than 4,000 electors, potential candidates must submit original endorsement signatures from 25 people who are eligible to vote in the municipality.<sup>60</sup> To ensure that all signatures are accepted, we recommend doubling the required number of signatures for your application, if possible.

## NOMINATION DAY

Nomination Day is the last day to file a nomination to be an election candidate, and all paperwork must be in by this date. The nomination day differs between municipalities and provinces and territories – some dates may be consistent across multiple jurisdictions while others may vary from municipality to municipality. For example, Alberta municipal elections take place on the third Monday in October and candidates can begin filing nomination papers on January 1st of the election year. Candidates must submit their nomination papers by Nomination Day, four weeks before Election Day.<sup>61</sup> In contrast, during the 2022 municipal elections in Ontario, nomination day was set in August 2022, two months before the October election.<sup>62</sup>

Nomination papers can be submitted in person or online to your City Clerk. It is also important to note that all of your eligibility requirements, such as proof of your leave of absence from work (if required), must be in effect by nomination day. Similarly, as the case in Ontario, you must withdraw your nomination application by Nomination Day if you decide not to continue with your campaign. For more information about your municipality's nomination process, please check your local government website or office.

## REQUIREMENTS TO BE A MAYORAL CANDIDATE

City/Town	Requirements (Mayor)	Link for more information
Toronto, Ontario	1. Standard requirements	Become a Candidate – City of Toronto
	2. Own or have a spouse who owns or is a tenant of land in Toronto	
	3. The candidate cannot be a current judge of any court, a member of the provincial legislature or federal House of Commons or Senate, <sup>63</sup> or an employee of the City of Toronto <sup>64</sup>	
	4. Necessary financial statements must be submitted prior to the closing of nominations to avoid disqualification	

City/Town	Requirements (Mayor)	Link for more information
Iqaluit, Nunavut	1. Standard requirements	For Candidates Elections Nunavut (archive.org)
	2. The candidate cannot have been convicted of an offence under local or federal election acts within the past 5 years	
	3. The candidate cannot be in tax arrears (municipal)	
	4. The candidate cannot personally be in debt to the municipality for more than \$500 over 90 days	
	5. The candidate cannot be a judge (excluding citizenship court), work for Elections Nunavut or be a member of any provincial or territorial legislature, the Senate or the House of Commons <sup>90</sup> days	

# REQUIREMENTS TO BE A CITY/TOWN COUNCILLOR CANDIDATE

City/Town	Requirements (Mayor)	Link for more information
Wood Buffalo, Alberta	1. Standard requirements	Candidate Guide to Municipal Elections (rmwb.ca)
	3. The candidate cannot be an auditor for the municipality or school board	
	2. The candidate cannot be a current employee of the municipality or school board. <sup>65</sup>	
	4. The candidate cannot be in tax arrears for more than \$50 excluding current taxes and arrears with a consolidation plan that is not in default	
	5. The candidate cannot have been convicted of an offence under local or federal election acts within the past 10 years	
	6. Met all campaign disclosure requirements if the candidate participated in a prior election	
Vancouver, British Columbia	1. Standard requirements	How to officially become a candidate in the Vancouver election   City of Vancouver  Vancouver Charter (gov.bc.ca)
	2. The candidate cannot be a judge for the Provincial Court, Court of Appeal or Supreme Court	
	3. The candidate cannot be an employee of the City <sup>66</sup>	
	4. The candidate cannot be subject to disqualification under Section 38 (2) of the Vancouver Charter	



**Look up your municipality's nomination requirements and add your notes here. What do you need to complete your nomination package? What are important dates to remember?**

## ROLE OF THE CITY CLERK

The office of the City Clerk<sup>67</sup> is responsible for administering the City's legislative obligations, ensuring transparency of the municipal decision-making process, record keeping and more to support the City Council and the local government. One of the primary functions of the City Clerk is the administration of municipal elections. The responsibilities of the City Clerk in preparing for and conducting a municipal election can include the following:

### **Accessibility**

The City Clerk must take into consideration the needs of voters and candidates with disabilities. This can include preparing a proactive plan to identify and remove barriers, such as inaccessible voting locations, considerations for individuals with vision or learning disabilities, and preventing barriers.

### **Information**

The City Clerk and their office provide accurate and timely information to voters, including new voters such as youth and individuals who recently became Canadian citizens, and candidates on the ballot so that they can fully exercise their right to take part in the democratic process through municipal elections.

### **Reporting**

The City Clerk must complete and make public reports on the candidates' financial statements (pre-election), election results (post-election), and any accessibility issues that were identified during the election (post-election).

It is important to note that the role of the City Clerk in elections also depends on local laws and practices. In Prince Edward Island, for example, there is a Municipal Electoral Official who administers the elections and in Yukon, a Returning Officer is appointed to administer a municipal election. Some provinces and territories have provincial/territorial bodies that are responsible for administering municipal elections, such as Élections Québec and Elections Nunavut. To determine who is responsible for administering elections in your municipality, check your local government website.

The City Clerk is also very useful during the election to answer any questions about rules. Never think you are bothering them. It is their job to answer your election questions.



# CAMPAIGN FINANCES

## CAMPAIGN EXPENSES

Campaign expenses are expenses incurred during the specified campaign period for the benefit of the registered candidate's campaign, which can vary based on the municipality.<sup>68</sup> As always, check with your local government website or office to receive clear guidance as to what expenses are eligible to be categorized as a campaign expense.

It is important to clarify the difference between campaign expenses and election expenses, which are any expenses incurred during the election period. Also worth noting are the different types of campaign expenses that can be incurred, such as shared expenses, when two or more candidates agree to share the cost of a specific expense, and personal expenses, which can include campaign-related travel, child or family care when you are the primary caregiver, and expenses related to a personal disability.<sup>69</sup>

All expenses must be recorded and reported, but only campaign expenses are subject to expense limits. A campaign expense limit is a cap on the amount a campaign can spend over the campaign period. Not every municipality has one, and how that limit is determined is dependent on your municipality and your province/territory with some using a straight dollar amount and others using a formula based on population or the Consumer Price Index.<sup>70</sup>

In Ontario, for example, the campaign expense limit is based on the population of eligible electors in the candidate's electoral district. Expenses during the campaign period must not exceed \$1.50 multiplied by the number of eligible electors.<sup>71</sup> Conversely, the Alberta provincial government can set campaign expense limits but did not set any for the 2021 municipal election in Edmonton.<sup>72</sup>

## WHAT ARE CONSIDERED CAMPAIGN EXPENSES?

Campaign expenses include materials used for various campaign activities, advertising and communications, and services or space related to the campaign. When possible, locate a small business supplier who can provide the goods or service from your community. This is a great way to get to know the local businesses in the area and strengthen your connection with the community. It's also important to delegate these types of details and decisions to someone on your core campaign team, such as your campaign manager, so that you can focus on campaigning and meeting voters.

### **Some examples of campaign expenses include the following:**

- Rent/cost of space for a campaign office
- Printing costs for brochures, pamphlets, lawn signs, billboards at bus stops, etc.
- Costs associated with campaign rallies including the venue and audio/visual equipment
- Campaign-related functions such as multiple phone lines for phone canvassing, office equipment like tables, chairs, and office supplies
- Paid research including polling voters
- Paid canvassing (in-person, via telephone or online)
- Personal expenses during the campaign (must be considered reasonable)

Some campaign expenses may not be subject to campaign spending limits. These can include costs related to legal and/or accounting services directly related to the campaign, interest on a loan used for campaign expenses, personal expenses and incidental expenses related to the campaign.<sup>73</sup>

Check guidance documents prepared by your municipality, and consult your chief financial officer, accountant, or the municipal official in charge of the elections such as the city clerk or the election's returning officer to help ensure compliance.

## WHAT ARE NOT CONSIDERED CAMPAIGN EXPENSES?

While certain goods and services may be used as part of the campaign, not all of them constitute campaign expenses. Some examples of expenses that are not considered campaign expenses include the following:

Any goods produced or services provided by a candidate or volunteer from their own property (e.g., brochures, a volunteer's home internet or mobile phone subscription, or food prepared at home and brought to the campaign office)

Costs involved with a publication that would have been purchased regardless of the election

Free media coverage including the use of free social media outlets



**List some campaign expenses you know you will require during your campaign. Which vendors or suppliers can provide this from your community? Who can help you manage these campaign expenses, including getting quotes for each item?**

### NOTES :



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## CAMPAIGN BUDGET

The campaign funding and budget are essential elements of a successful campaign and require knowledge of local and provincial regulations regarding spending limits, contribution limits, and rules regarding who is eligible to contribute to the campaign. Your campaign budget should include all potential expenditures from the first day of campaigning up to election day, from vital campaign elements such as staff, promotional materials and travel related to the campaign as well as miscellaneous costs that may arise.

Additionally, reflect on your personal needs. What support do you need to enable you to campaign effectively? For example, are you the primary caregiver for a child or older family member? Will you incur additional expenses throughout the campaign process as a result of a disability such as adaptive technology or specific transportation needs? These are considered campaign expenses and should be included in your budget.

**NOTE: not all campaigns have and office or pay their staff.**

Example: Developing Your Budget		
Item	Details	Expected Cost
Personal Expenses	Childcare	\$
Campaign Staff Payroll	Campaign manager Communications Financial agent	\$
Campaign Office	Rental space Utilities Office furniture Office supplies	\$
Advertising	Campaign lawn signs Socialmedia advertisements Radio ads Newspaper ads Bus stop billboards	\$
Travel	Gas Hotel Food	\$
Fundraising Events	Rental space Audio/visual equipment	\$
		<b>Total</b>

A key point worth highlighting is that having a large campaign budget does not necessarily lead to victory – while money is helpful, the size of the campaign budget does not guarantee a win. For example, look at the following campaign expenses from District 13 for the 2020 municipal elections for a Councillor in Halifax, Nova Scotia. The candidate who won did not have the biggest campaign budget.

<b>Municipal Election October 2020 Councillor District 13, Halifax, Nova Scotia</b>			
<b>Candidate</b>	<b>Campaign Contributions</b>	<b>Campaign Expenses</b>	<b>Surplus/Deficits</b>
Candidate 1	\$1,400.0	\$2,070.08	- \$670.08
Candidate 2	\$1,211.56	\$1,211.56	\$0
Candidate 3	\$7,460.73	\$7,460.73	\$0
Candidate 4	\$2,195.00	\$2,195.00	\$0
Candidate 5	\$5,122.36	\$5,122.36	\$0
Candidate 6	\$12,736.05	\$12,736.05	\$0
Candidate 7	\$8,916.96	\$8,916.96	\$0
Candidate 8	\$8,089.56	\$8,089.56	\$0
Candidate 9	\$0	\$2,107.66	- \$2107.66

\*Won the election

Source: Candidates' campaign contributions and expenses | Halifax

Being the best candidate, being able to communicate your message out to the electorate, and meeting your constituents and converting them into supporters are key to a winning campaign. Similarly, being resourceful and finding creative ways to use the campaign funds you have can also go a long way. There are certainly campaign expenses that need significant investments such as rent for a campaign office or a billboard in a high traffic area. However, there are other opportunities for low-cost campaigning such as effective use of social media tools that are often free, creating buzz and momentum through word of mouth, and having supporters host you in their homes to meet their friends and family through kitchen parties, for example.

## RAISING CAMPAIGN FUNDS

In order to run a strong and competitive campaign, you will need to raise campaign funds. The majority of candidates, regardless of their personal financial situation, raise funds throughout their campaign through three primary methods: fundraising, donations, and loans. As with the other financial aspects of the campaign, there are a number of critical rules that govern the raising and spending of campaign funds. It is important to be familiar with these rules.

Additionally, it is important to keep detailed financial records on where the funds are coming from, including the personal details of individual contributors. As this is a detail-oriented endeavour, it's important to have someone from your core team such as your chief financial officer and trusted volunteers to accurately maintain this database, including as much information as possible. The financial records and database also need to align with the funds in your campaign bank account, as well as the campaign income and expense records for reporting requirements that need to be submitted to the municipality after the campaign is over. Having a strong and organized campaign team will help ensure that the financial aspect of your campaign runs smoothly.

While your team works on the administrative aspect of raising funds, the candidate's role is to cultivate relationships with prospective donors and to share appreciation to your supporters, including those who have contributed financially. Having a fundraising dinner or a special event to thank your financial supporters is one way to extend the candidate's thanks.

## KEY RULES AND LIMITS WITH RAISING CAMPAIGN FUNDS

Before any fundraising can begin or any contributions received, you must set up a dedicated campaign bank account, ideally with your chief financial officer. This is a key consideration so that you do not need to be the one accessing the funds especially as the campaign ramps up. Your chief financial officer can access the account, make deposits and withdrawals, and sign cheques as needed.

The campaign bank account must be used for all financial transactions which makes financial record keeping easier. Once again, check the specific instructions for your municipality, but, in general, no expenses should be paid in cash. Every transaction must go through the campaign account.<sup>74</sup> While there can be exceptions to this, depending on the municipality, such as the accepting of monetary donations, using the campaign account can help you keep track of funds received and expenses procured. Also in this way, the chief financial officer is able to track all incoming and outgoing financial transactions as they are the only other person authorized to access the campaign account in addition to the candidate.

Contributors must use their own funds/goods/services when making a contribution. They cannot contribute to your campaign on behalf of a third party.<sup>75</sup> Candidates are generally permitted to make contributions (funds, goods, services) to their own campaigns.<sup>76</sup> These contributions must follow the same recording requirements, regulations, and limits as other contributions as determined by your municipality and/or province/territory. Additionally, some municipalities and provincial and territorial election regulations impose a limit on how much a candidate can contribute to their campaign.<sup>77</sup> For more information check with your local government and provincial/territorial election regulations.

Under the Canadian **Criminal Code**, lotteries and anything considered to be gambling or a 'game of chance' such as 50/50 draws, raffles, or a game of poker are illegal unless sponsored by a charity. Therefore, using any such lottery-based methods to raise campaign funds is prohibited.<sup>78</sup>

It's also important to be aware that just as some municipalities have expenditure limits, some municipalities have limits on the dollar amount of donations a campaign can receive. As of 2021, Saskatchewan and New Brunswick are the only two provinces that do not have donation limits for municipal campaigns. In addition, donation limits can differ within the same municipality depending if the campaign is for the school board, council, or the office of mayor. For example, both Halifax and Toronto have different donation limits for the mayoral and councillor campaigns.<sup>79</sup> To determine if your municipality has a donation limit and what the exact dollar amounts are, check with your local government website or Clerk's office to ensure that you and your team are both aware and compliant. As online campaigning continues to grow and our world becomes increasingly digital, new questions have been raised regarding online crowdfunding as a means of raising funds, including cryptocurrency as a valid campaign donation. In Ontario and British Columbia, online crowdfunding (or crowdsourcing) is an acceptable form of raising campaign funds and must follow the same rules as any other donation such as providing contact information of the contributor and not accepting anonymous donations. Both provinces also recognize cryptocurrency as a valid campaign donation; the value of which is based on the market rate on the day the contribution was made.<sup>80</sup> Not every municipality or province has rules regarding new digital forms of fundraising and currencies, for more information check with your local government website or contact your local government office.



**Complete this table with information that applies to your campaign, and municipality.**

<p><b>Campaign expense limit (maximum allowed)</b></p>	
<p><b>Campaign donations limit (maximum allowed)</b></p>	

## FUNDRAISING EVENTS FOR YOUR CAMPAIGN

There are many ways to raise funds for your campaign. Aside from a direct “ask” from supporters and like-minded individuals, fundraising events are a great way to raise financial support for your campaign as you are also able to meet the people in your constituency and expand your network. While different types of fundraisers can be held, generally the money raised is coming from ticket sales or entry fees. You can also add different types of incentives such as a Meet the Candidate pre-event with a limited number of tickets for an additional amount.

Depending on your municipality or province/territory, there may be a minimum price for a ticket or entry fee before it can be considered as a campaign contribution. In British Columbia, for example, that amount is \$51 or more while in Manitoba, anything more than \$10 is considered a campaign contribution. The purchaser of the ticket(s) and/or entry fee(s) must be an eligible contributor in your municipality. Therefore, contributions from companies, organizations, and trade unions are prohibited in some municipalities.<sup>81</sup>

If you decide to hold an auction as a fundraiser, there can be special rules relating to the value of donated goods and services. In Nova Scotia, for example, the individual donating the goods or services would be listed as the donor, and the good/service would be recorded at the value that was paid at the auction, not its actual commercial value.<sup>82</sup> Fundraising event statements are required in some municipalities with details for each fundraiser you hold, such as date, location, total costs and total revenue, to be submitted with your financial statement at the end of the election period.<sup>83</sup>

Here are some examples of fundraising events<sup>84</sup> you can organize:

- **Community BBQ**
- **Concert in the park (or movies at the park)**
- **Pancake breakfast**
- **Any sort of “a-thon”**
- **A market or food truck festival**
- **Community garden event day**
- **A special dinner with a segment of the community such as small business owners, or community leaders, or volunteers**
- **A selfie booth with the candidate**
- **Share a private meal with the candidate**

## RECEIVING DONATIONS FOR YOUR CAMPAIGN

Receiving donations for your campaign is another way to raise financial support. However, there are rules on what donations you can and cannot accept or not. A donation is not just money - it can include goods and services donated in full or at a discounted rate. Non-monetary donations should be assigned a market value to be recorded and disclosed in the same way as monetary donations, identifying the details of the donation such as the name and details of the donor, the date it was donated.<sup>85</sup> As such, it's important to check the eligibility of the donation prior to accepting it. This can be a delicate manner as behind every donation is a donor. Create a system in place for someone on the campaign team to receive the donations and complete the eligibility and reporting requirements aside from the candidate, to ensure that the candidate's relationships with individuals remain on a positive track. Similarly, ensure that you are able to send a thank you note from the candidate to the donors. These gestures will go a long way to build your voter base and a winning campaign.

The minimum donation amount that requires the contributor to provide their name and contact information can vary significantly by municipality. As noted above, in British Columbia, names and contact information are required for donations over \$50. However, in Charlottetown, PEI, that information is only required for cumulative donations of \$250 and above from a single person.<sup>86</sup> To ensure that your financial plan and record keeping are in order, it's important that you or your chief financial officer validates the requirements with your local government right at the beginning of your campaign before any donations are received and processed. It's also important that you limit who is able to handle financial matters in your campaign and that there is a clear process on how to go about receiving donations. Consider a specific training for this group of volunteers and ensure that your chief financial officer is the final authority as they manage all the compliance requirements on behalf of the campaign.

Lastly, the ability to receive anonymous campaign donations depends on your municipality and province/territory. In many provinces and territories, including Nova Scotia, Ontario, and Yukon, candidates are not permitted to keep anonymous donations and must dispose of the funds by returning them to the donor (if possible) or handing them over to a designated election official.<sup>87</sup> In British Columbia, however, anonymous donations of \$50 or less are permitted. However, if the amount, either of a single anonymous donation or multiple anonymous donations from the same source, totals over \$50, the donations are prohibited.

## IDENTIFYING POTENTIAL CAMPAIGN DONORS<sup>88</sup>

Before beginning your fundraising campaign, you must learn to say: "I need your help in my campaign".

Then, establish three lists of names of people from whom you will solicit contributions.

<p><b>01</b></p>	<p>On your first list, enter the names of all your 'nearest and dearest family, extended family and close friends. This list may be as long as 100 names.</p>
<p><b>02</b></p>	<p>On your second list, enter the names of all those who you know well but to whom you are not as close as those in the first list: colleagues, members of associations or boards you belong to, suppliers, business partners, etc. You should be able to come up with at least another 100 names.</p>
<p><b>03</b></p>	<p>On your third list, enter the names of everybody else you know, or your family and team knows: businesses, professionals, community leaders, etc.</p>



## HOW TO APPROACH POTENTIAL DONORS<sup>89</sup>

Once you have established your three lists, you must determine who will approach which potential donor, when and how:

- **The rule of the game is that the candidate should always be the one making the direct request. The fundraising chair and other key supporters can ensure follow-up when needed.**
- **The least effective way of raising funds is to simply send a letter. There is usually, at best, a five per cent response.**
- **The most effective tool is the phone contact saying something like: “I really want to get elected because (your vision or goal), and I need to raise money to do so. I was hoping you may be interested in supporting me with a financial contribution of some kind.”**
- **You, the candidate, should be the only one to solicit the people on the first list. This can be done in the course of a face-to-face meeting or over the phone. When appropriate, this first contact should be followed-up with a card or a phone call reminding the person of his or her commitment to provide some funds for your campaign.**
- **You, the candidate, should make the initial call to the people on the second list.**

For the third list, in consultation with your fundraising chair and campaign manager, you may choose to send a personalized letter to each one of these people indicating that a call will follow. You, the candidate, may make the call or one of your supporters who knows this person could make the initial call, followed by one from you. Your supporter could say something along these lines: “I am calling because I am supporting the candidacy of (your name) as (councillor, trustee, mayor) because I really believe in what she wants to do and her ability to deliver. In fact, I have personally donated (amount) to help her. I am calling you, as a friend (or colleague) to also donate something to help her win this campaign.”

**Remember:** Keep good records and always send a “Thank you” note no matter how small the donations. Make time every day to make fundraising calls or write notes, sign letters.

**If each one of your friends was able to make about a dozen such calls, this should be very effective.**

### **Keep in mind the following(!):**

- Don't forget that your spouse, partner, siblings, parents, children, in-laws and close friends can be formidable fundraisers for you.
- Find people who are good at soliciting funds to do that job.
- Never ask a friend who is not comfortable soliciting money to do fundraising for you. It's hard to undo the impact of a reluctant salesperson.
- Then GET OUT AND DO IT: knock on doors, attend fundraising parties organized by friends in their homes (you can attend more than one a day), and pick up the phone and call.

## GETTING A LOAN TO FUND YOUR CAMPAIGN

Another option to access campaign funds is to seek out a loan from an acceptable financial institution and/or eligible individual. This is dependent on your municipality as some only permit loans from financial institutions. Similarly, the definition of an eligible individual can vary depending on jurisdiction.

It is important to keep detailed financial records on any loans taken out for the purpose of the campaign, including the details of the financial institution or eligible individual providing the loan, the date the loan was taken out, the principal amount and interest rate (including the prime interest rate at the time the loan was taken out), and the date the loan is due. Although loans are a good idea to kickstart a campaign, also keep in mind that it adds some pressure to the fundraising team as ideally, the campaign is also able to raise funds to pay out the loan as part of your team's campaign efforts. This is not recommended although it is good to know that this option exists.



**Now put your budget and plan together taking all of this information into account. Think about your “Win Number” – your financial goal for your campaign and how to truly reach the voters. Think realistically about your time and where it is best spent. Think about your opponents, the political climate, and your strengths and weaknesses. Write your reflections here.**

### NOTES :



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## TAX CREDITS

The availability of tax credits for contributions to municipal election campaigns is dependent on the jurisdiction of the municipality. The Canadian Revenue Agency (CRA) only recognizes political contributions at the provincial and territorial level to a recognized political party. Some municipalities have their own tax credits system. For example, Toronto has a Contribution Rebate Program where individuals who contribute money to a candidate, be it for council or the mayoral race, may receive some of their contributions back depending on the total amount contributed.<sup>90</sup> Check with your local government to determine the availability of tax credits from campaign funds donated to candidates.

## DONOR/DONATION DATABASE (SAMPLE)

Here's an example of a donor/donation database. Check the rules with your local government and adapt the database accordingly.

Donation ID #	01	02	03	04	05	06	07	08	09	10
Donor Name										
Donor Address										
Date of donation										
First-time donation? (Yes or No)										
Type of donation (Item or Funds)										
Value of donation (amount or market value)										
Who received the donation from the campaign?										
Is the donation eligible? (Yes or No)										
If Yes, has it been deposited?										
If No, has it been returned?										
Thank you note sent? (Yes or No)										

## COMMUNICATIONS: DIFFERENT TYPES OF COMMUNICATION MATERIALS

Your campaign will have different audiences and you will be able to use different channels to communicate with them. Regardless of the approach or audience, it is important to maintain consistency of the message – of who you are, why you are running, your vision and campaign platform, and why you are the person to be the next elected official for your community.

A communications plan is a useful tool to have, as it ensures consistency and alignment of the messages regardless of the communication approach or tools used.



## BUILDING THE CAMPAIGN'S COMMUNICATIONS PLAN

In their [Municipal Elections in Canada a Guide for Women Candidates](#), the Federation of Canadian Municipalities (FCM) highlights the following considerations when building your campaign's communication plan:

- 1. Audience: Who are you trying to reach?**
- 2. Method: Where does the audience get its information?**
- 3. Messages: What are the right messages for the audience?**
- 4. Resources: What tools do you need to deliver the message to the audience?**
- 5. Timeline: When will you be sending the message?**



**Reflect on the following components as you build your campaign's communications plan. Work with your campaign manager and your communications director, if available.**

<b>Audience</b> Who are you trying to reach?	
<b>Method</b> Where does the audience get its information?	
<b>Messages</b> What are the right messages for the audience?	
<b>Resources</b> What tools do you need to deliver the message to the audience?	
<b>Timeline</b> When will you be sending the message?	

## DEVELOPING VARIOUS COMMUNICATION MATERIALS

The use of various communication materials will vary depending on your resources, the audience, the objectives, and the message you are communicating.

Additionally, consider the following:

- **Will the communication materials have a digital equivalent? If yes, how will it be disseminated? Is it through the campaign website, email, or social media accounts? Do you need different formats for the same image and text to fit the specific digital platform?**
- **Will the communications be translated into more than one language?**
- **Will the communications materials be a part of a campaign that will last several days, weeks, or months?**
- **What is the main purpose of the message? Is it to introduce the candidate, inform voters about your platform, convince voters to support you, recruit volunteers to your campaign, highlight an emerging issue during the campaign, or challenge the other candidates?**
- **How will the voters access the communication materials? Is it accessible? Does it consider the diversity of the audience? What about hard to reach populations? Consider how you can engage all segments of your community and how to minimize barriers to engagement. For example, your brochures could be in different languages that represent your constituents.**
- **Will you put your picture on your material or not? What are the pros and cons?**





**Use the following table to select the communication materials that will be used or you hope to be used in your campaign:<sup>91</sup>**

Campaign Literature	Online materials	Media
Candidate card	Website	Press Kit
Brochures	E-mail	Media Contact List
Flyers & Door hangers	Social Media (Facebook, Twitter, TikTok, Instagram, etc)	Media Calls/Interviews. Remember multi-cultural media
Newsletters	YouTube Videos	Letters to the Editor, Op-Ed Articles
Buttons and stickers	Blogging	Press Releases
Lawn signs	Virtual and in-person meetups	Advertising (TV, radio, newspaper, billboards)

### NOTES :

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## WRITING YOUR BIOGRAPHY

You want people to know who you are, why you are running for office, and what you stand for. Your biography is a way to introduce yourself as the candidate voters can relate to and support. Your biography highlights your profile, how you have been a part of the local community, your professional background, and your contributions to society. Written well, a biography is able to set up positive first impressions to persuade voters that you are the right person for the elected position. Your political biography should answer what is in it for the voter.

Remember that although your biography must share relevant details about yourself, it is not simply a list of your accomplishments.<sup>92</sup> Your biography must be relatable, compelling, and interesting. It includes your personal, political, and professional experiences to highlight your journey as a person and as a leader. If you are able to inspire voters and translate your experiences to situate you as the best candidate for the position, then you are able to maximize this form of communication.

### Here are some general steps you can take to create your political biography:<sup>93</sup>

**Step 1.** Write a brief summary of who you are and the reasons why you are running for elected office.

A good rule of thumb is that this blurb can fit into your social media profiles.

**Step 2.** Write your full biography and aim for 400 to 500 words.

**Step 3.** Take a professional headshot done to accompany your written biography.

**Step 4.** Transform your full biography into a 20 to 30 seconds “elevator pitch”, which also means that the tone will be friendly and credible, and delivered through the spoken word rather than the written version. This version is a short description of yourself that allows the listener to learn the basics about you very quickly and also get a feel of your vision for your community. This version of your biography can be delivered by the candidate when you are asked to introduce yourself, or if another person is introducing you to a crowd or to another person.



**Reflect on the following components as you write your biography. Work with your campaign manager and your communications director, if available.**



<p><b>What is your name?</b> What is the meaning and history behind your name? Explore your family heritage and cultural background.</p>	
<p><b>What has been your primary occupation?</b> Are you a businessperson, a family woman, or a person with strong ties to the community?</p>	
<p><b>What is your connection to the community that you are running in?</b> Where were you born and where did you grow up? If you did not grow up in the area you are running, explain why you moved and when. Try to show some ties to the larger community.</p>	
<p><b>What are your experiences, and how do they relate to the voters?</b> What hardships have you overcome, and how can this experience make you a better leader?</p>	
<p><b>Why are you running, and what are you hoping to achieve?</b> Explain what you are running for and why. Share highlights of your vision and what's in it for voters and the community if you win the election.</p>	
<p><b>What inspirational message do you want to leave with voters?</b> Finish your candidate biography with a strong statement. Be inspirational. Leave the reader knowing that you deserve their vote.</p>	

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## CAMPAIGN WEBSITE AND CAMPAIGN EMAIL

Every campaign needs your own website and social media accounts. Digital means of communications “are often the first or second point of contact between voters and the candidate” (Harris, 2020). As you plan your campaign, be prepared to invest some campaign funds to acquire your website domain.

In fact, it’s important to acquire several versions of your website link such as the \*.ca, \*.com, or \*.org. We recommend that you also purchase the different versions of your name, especially those that are known to your voters, to ensure that all of these website addresses will point to your official campaign site. You will need the domain name so that you can also create email addresses associated with your website. For example, if your website address is: [www.candidatename.ca](http://www.candidatename.ca), then, the email addresses associated with your campaign will be: [firstname@candidatename.ca](mailto:firstname@candidatename.ca). Note that you will need to purchase an email provider such as Google’s GMAIL or Microsoft’s email before you can use this service. The critical first step, however, is to secure the domain name (e.g., the name/address of your website) In addition to the domain name, and email address, you will also need to purchase a web hosting service where the content and files for your website will be stored, as well as the website builder software or platform to enable you to manipulate and create the design and content for your website. We highly recommend that you seek out support from a volunteer or a paid service provider to establish these technical components, as your campaign website is critical in elections campaigning in the 21st century.

<b>Suggested content for a Political Campaign Website<sup>94</sup></b> (Remember to use diverse pictures on your website but also ensure who they are)	
<b>About</b>	The candidate's biography and the reasons for running for office
<b>Issues</b>	The candidate and the campaign's values and platform
<b>Donations form</b>	A fundraising opportunity by having the option of accepting donations online in a safe and secure way
<b>Volunteers</b>	A space where people interested in contributing their time and skills can easily contact campaign organizers and ideally, register to volunteer. The different roles needed can also be highlighted here, as well as upcoming volunteer orientation dates/times.
<b>Newsfeed/Events</b>	These pages highlight what is happening around the campaign, any upcoming events, as well your participation in media outlets
<b>Get in touch/Contact</b>	A space to interact with voters, Q&A, chat features, and your contact information for the campaign.
<b>Endorsements</b>	Feature quotes from individuals and public figures supporting you

## ADDING PICTURES ON YOUR WEBSITE OR SOCIAL MEDIA

It's important to add photos and videos on your website as a way to be more engaging, authentic, and relatable to your voters. Ensure that you have photos of yourself in the community throughout your campaign. To do this, consider having a photographer as a volunteer during the campaign trail.

However, as you include images and videos of other people, have your campaign team work towards getting the consent of those captured in these materials before you post them on your website or social media. Although we understand that this is not always possible, especially in a crowd, it is a good practice to strive towards especially for images and videos where there is only a few people highlighted with the candidate or when minors are involved.

### Here are other tips to consider:

- Are you representing your community accurately? Is there diversity in the images and videos? Are people represented in a respectful manner? Be mindful and reduce the use of individuals in a tokenistic manner.
- Have you captured the names of individuals highlighted in the image? Have they given you permission to add them to campaign materials, as including them could be interpreted as an endorsement? Remember you need permission from parents or guardians to post pictures of children under 18.
- Do you have a policy or a process if a person captured in the image with the candidate could potentially be problematic and could be used by the media or opponents against you and your campaign? Be prepared, as we understand that the inclusion of people in campaign materials is never risk free.

## CAMPAIGN SOCIAL MEDIA ACCOUNTS AND ENGAGEMENT

It is well known that former President Barack Obama maximized the power and utility of social networking including social media platforms to win the 2008 American presidential elections.<sup>95</sup> Researchers found that Obama's campaign used over 15 social networking sites in total.<sup>96</sup>

Nowadays, social media platforms are used professionally and personally. It is the digital space to reach eligible voters of all ages. It includes free platforms such as Twitter, Facebook, Instagram and Tiktok where there is an option to purchase targeted advertising. LinkedIn is another site for working adults. The use of social media during a campaign must be accompanied by a strategy, a communications plan, and volunteers to monitor and post regular content to ensure fresh engagement. It is also important to note that these sites often have direct messaging and public comments, which means that it needs to be monitored and responded to during the campaign. In essence, social media accounts require dedicated time and resources.

The website [Welcome to Canadian Politics](#), developed by students from the University of Waterloo and the University of New Brunswick, mentions that the use of social media can create controversy because they allow the voters to interact directly with all candidates in real-time. Disagreements and challenging questions are common in these platforms that need to be addressed by the campaign; although note that most people have an expectation that the responses are coming directly from the candidate. Misinformation can also float in social media, as well as bots that could disrupt the democratic process. As highlighted in greater detail in section 3, it is also important to be aware of the personal challenges associated with constantly being online for women candidates, especially for Black women due to misogynoir (see section 3.1). Women candidates and elected officials have often been a target of cyberbullying or online harassment, while some could escalate to stalking. As such, it is very important to reflect and set your boundaries as a candidate as part of your social media strategy. Ensure you have your team around you to not only effectively use social media to campaign, but also to ensure your safety. Here are a few things that you and your team can do:

- **Create a social media policy (boundaries) based on your own comfort and experience**
- **Train your team on what to do when they receive toxicity.**
- **Rotate who manages your social media**
- **Document or save messages**
- **Report messages to police if you feel threaten**
- **Report message to the platform**
- **Screenshot the post and call it out, so others know what is going on**
- **Use the Block or filter feature (you may be called out on this)**
- **Choose who can respond to your messages and let everyone know this function is in place**



**What social media accounts do you currently have? Which ones do you want to include as part of your campaign?**

## PREPARING FOR DEBATES

A debate is a pivotal moment for your campaign. It is an opportunity for you to engage directly with your opponent(s) and engage the electorate to discuss your platform and how you would address key issues and concerns in your community. Debates are opportunities to highlight what sets you apart from the other candidates and what you will bring to the role if voted into office. Whether the debate is for a small group or a large audience, with one opponent or several, preparation is required. While not all voters will watch a debate, especially if it is not televised, there will certainly be social media posts and newspaper articles recalling key moments and memorable statements, both good and bad. Commentaries from the debates can influence electors in their voting decision, and it's good to keep them in mind when answering any question and responding to any instigation by the other candidates. Doing well in a debate, being able to hold your own, remaining calm, stating your positions clearly, and navigating difficult questions and exchanges can help strengthen your position and establish your credibility and governmental authority which can influence the outcome of the election.

## PLATFORM, COMMUNITY ISSUES AND CURRENT EVENTS

Having a debate strategy can help you stay focused. One strategy is to stay on message by effectively communicating your platform and highlighting your qualifications for the role. Developing your platform is one of the first things you must reflect upon even before you submit your nomination papers. In fact, it could be the driving force, reason, and purpose for why you have decided to run for office in the first place. What are the main things you want changed at City Hall? What do you want to accomplish in the local government that requires your direct involvement and leadership? Write these things down and articulate them clearly and communicate this message wherever you go throughout your campaign. As you do so, then the debate will allow your audience to hear your key messages specifically as it relates to the questions being asked during the debate.

Part of developing a debate strategy and your platform is getting to know your audience and your voters. What are the issues that interest and affect them and their neighbourhoods? Similarly, what are the current events leading up to the election? In preparing for the debate, reviewing what you and your team have been hearing during canvassing (see Section 2.23) and attending community events are excellent ways to highlight that you are listening to voters and care about what they care about.

Other ways to keep up to date and informed is through the local news such as local newspapers including neighbourhood-run publications, local radio and social media. As you are engaged in the campaign, keeping up with the latest news can be delegated to a campaign volunteer who can summarize the issues to help prepare you for an upcoming debate.

## DEBATE PREPARATION AND PRACTICE

As mentioned, a starting point for your debate strategy is to identify your audience. You need to always have voters in mind, and speak to them during the debate. Use the debate as an opportunity to reach undecided voters and voters who may be leaning towards another candidate while remaining true to your platform.

As mentioned, a starting point for your debate strategy is to identify your audience. You need to always have voters in mind, and speak to them during the debate. Use the debate as an opportunity to reach undecided voters and voters who may be leaning towards another candidate while remaining true to your platform.

If there are highly divisive issues in the election that are polarizing voters, consider how you can make connections with voters with opposing views. From there, develop your opening and closing statements, and outline the key messages that you want to convey during the debate, including points and positions from your platform.

As you continue to prepare and practice, engage your communications team to ensure that you are able to share sound bites that represent you and your platform well as part of the debate.<sup>97</sup> While there are various views on the impacts of focusing on sound bites on political discourse, the reality is that in the age of TikTok and “top 10 lists”, sound bites are a necessary consideration. In addition, you do not want to be the candidate with a misconstrued sound bite, so it’s important to be mindful and ever present as you convey your message at all times.

It is likely that many voters will not watch the debate in its entirety or at all, so how can you convey your key messages in a short and memorable statement? Additionally, consider what sets you apart from other candidates. What skills and experience do you bring to this role that makes you uniquely qualified? Do you have innovative solutions to community concerns? You want to make a positive impression, stand out and set yourself apart from other candidates as the best person for this role.

One common strategy to prepare for a debate is to have practice debates. Engaging in a practice debate with your team is a coaching moment to identify your strengths and weaknesses, and to improve your message delivery. Non-verbal cues, tone and delivery should also be assessed and discussed.<sup>98</sup> Practice debates simulate difficult and potentially emotional exchanges, to help you regulate your response to challenging questions and exchanges. A practice debate can help you develop a strategy on how to respond to difficult questions and how to refocus on your key messages. Ensure your core campaign team organizes practice debates with you periodically so that you are ready whenever a debate request comes in. Aim to make these practices as realistic as possible, with your practice opponent representing the other candidates and viewpoints.

## GET TO KNOW THE OTHER CANDIDATES AND THEIR POSITION ON KEY ISSUES

Just as becoming more knowledgeable about community issues and current events is an important aspect of preparing for a debate, so is getting to know the candidate(s) you will be debating with. Engaging in a debate against another person that you know something about is an important part of your debate strategy, as you can use it to differentiate yourself from your opponents and can also challenge their approaches that significantly differ from your vision for your community. Familiarizing yourself with their platform and where they stand on key election issues will help you anticipate and prepare for opposing claims from the other candidate(s). Additionally, it will allow you to effectively compare and contrast your platform and positions with those of your opponent(s). Use a tactical approach when challenging your opponents. For example, using humour and sadness rather than direct scorn or critique can be useful ways to effectively challenge your opponent while maintaining a calm and collected demeanour.<sup>99</sup>



**When getting to know your opponent(s), familiarize yourself with their platform and positions on electoral issues. Reflect on what you may have in common with other candidates, and what areas you differ.**

## STEREOTYPES AND BIAS IN POLITICAL DEBATES

It can be a very difficult experience when issues relating to personal identity become the subject of the debate, especially when stereotyping, biases, or microaggressions are introduced in the conversation. As a Black woman candidate, it is important to anticipate what your options are if these moments come up. Is it a moment to call in or to call out? Do you have the emotional bandwidth at that particular time? Are there allies or bystanders who can perhaps intervene? Or is it a trap to destabilize your composure to make a point about your electability and response under pressure?

Sexist and racist stereotypes and tropes can be prevalent throughout the campaign process, including during a debate. They can be quite explicit in nature; however, given the nature of politics in Canada, they are more likely to be implicit (i.e., microaggressions). Examples of these can include tone policing, having assertiveness be misconstrued as aggressiveness or anger, and being cast in a stereotypical light. In addition to having a negative impact on you as a person, these sorts of racist and sexist attacks can disrupt the debate, distract from the main point, and impact your campaign going forward.

One area that women candidates and leaders have to confront and navigate are the sexist commentaries about how they look in the public spotlight. Unfortunately, because of gender norms, what you say during the debate is not the only thing that sends a message. The way women dress can be read or interpreted as conveying certain messages that you may or may not intend.

While all candidates can face scrutiny on how they present themselves, such as wearing colours associated with political ideologies and parties in Canada,<sup>100</sup> women tend to face a higher level of scrutiny due to societal double standards. The scrutiny can shift to being quite personal, focused on a candidate's physical appearance or her personal style and can be underpinned by a beauty bias.

At the same time, however, there are certain norms when deciding what to wear for a candidates' debate such as wearing business attire. Keeping this in mind, you should be comfortable with whatever you decide to wear, both in terms of physical comfort and personal style. While it can feel like playing into a double standard, it is also important to consider that what you choose to wear can send a message.

For example, you could choose to wear something decidedly neutral, directing the focus to your words rather than your appearance. Conversely, you could choose to wear something that makes a statement about you where a famous example of this being Kamala Harris pairing her suits with Converse sneakers on the campaign trail to convey being relatable especially to young voters<sup>101</sup> or women politicians wearing white suits as “an homage to the white outfits often worn by suffragists during their fight to get women’s votes recognized” (Lang, 2020).

Another potential area of bias highlighted during a debate is the accent or a candidate’s manner of speech.<sup>102</sup> Language, paired with ethnicity and racialization, can also reveal immigration status. All of these social and personal identity factors can activate conscious and unconscious bias. The accent bias remains even though there are over 200 languages from around the world and over 60 Indigenous languages being spoken in Canada, in addition to regional and cultural dialects and accents.<sup>103</sup> Despite this fact, some accents and ways of speaking are considered to be reflective of intelligence and positive qualities, while others tend to be looked down upon and not easily trusted as credible such as the accent of a newcomer who neither speaks English nor French, depending on their place of residence.<sup>104</sup>



## ENGAGING WITH THE MEDIA

Engaging with the media is one way that you can communicate, deliver, and disseminate your message effectively and accurately to a broader audience. It is also a way to show credibility as you respond to current events occurring in your community.

If you are planning to run for elections, it's important to create connections with journalists and media personalities so that this groundwork has been laid before you begin your campaign. This includes multicultural media. If these bridges have not yet been made, recruit someone on your team who has these connections so that they help you navigate the space and be introduced to the media outlets that can help spread your message as an election candidate.

Even before engaging with the media, it's important to have key speaking notes prepared such as your brief introduction, why you're running, highlights to your platform, your vision for your community, and why you are the best candidate for the role. Similarly, it's important to be aware of the current issues happening in your community and in the municipality, as questions may arise and you want to be prepared and not be caught off guard while on live TV.

If possible, get training and receive coaching on how to effectively talk with a reporter and how to talk through a camera. Watch and listen to the recording, and find ways to improve your camera presence through your coach.

Be aware as well of the dangers associated with recording snippets that could misrepresent your message because of the way your words are edited for the broadcast. Similarly, get practice with how to field challenging questions to ensure that you remain to project a calm and credible demeanour throughout the broadcasted interview.

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## SOME TIPS ON HOW TO ENGAGE WITH THE MEDIA

The following is an important resource about how to engage with the media, found and adapted from the Federation of Canadian [Municipalities Municipal Elections in Canada: A Guide for Women Candidates](#):

### Some Tips on How to Engage with the Media

- 1 Get media training or have somebody play the reporter for you.
- 2 Practice with a neighbour or friend.
- 3 Record yourself, watch the recording with a coach, and identify ways to improve.
- 4 Use plain language that everyone can understand.
- 5 Have a contact list of all media outlets and reporters, columnists, editorialists and opinion makers.
- 6 Write a letter to the editor or submit comments or articles to printed or electronic media.
- 7 Book one-on-one interviews with Editors or reporters. Invite a meeting with the editorial board of the local newspaper.
- 8 Be prepared to do live interviews for electronic or online media, including social media influencers and bloggers. Stay on message and engage your audiences and remember, everything is on the record.
- 9 Usually, radio or TV reporters don't take clips from a speech. Be prepared with a 5 to 10 second clip to summarize your message for the reporter after the speech so that you can, to the extent possible, control the sound bites associated with you and your campaign.
- 10 Know your audience. You might have one goal and a key message, but you will have many audiences. Tailor your message based on your audience. Engage with different communication outlets appropriate to the audience you are trying to reach.
- 11 Clarify vague questions. Recognize if a question is not clear and decipher the intent, when possible.
- 12 Listen carefully to the questions. You can always answer questions by sharing your own message. Be personable and share personal stories including what you have heard from community members.
- 13 Remember that talking with the media is a conversation. Be engaged and share stories effectively, rather than a direct yes or no answer.
- 14 Breathe. Think. Reply. It's OK to show your humanity.
- 15 Have your team prepare media advisories and press releases. Organize your own media scrums and create your narrative or get ahead of the story to manage any negative ones that surface.

## TIPS FOR PITCHING TO JOURNALISTS

If you have a policy or issue that you would like to highlight you could pitch the story to media. Here are 12 tips to pitching to media from journalist Nick Westoll who presenting at OBVC's Municipal Bootcamp.

### Tips for pitching to journalists By Nick Westoll

#### **(1) Know your audience:**

Look at each outlet's overall body of work and then look at each reporter's background (most have bio pages with links to their stories) versus copy-and-pasting the story idea and sending it widely, especially if it's a niche topic.

#### **(2) Connect the pitch to the news cycle as best as possible:**

Of course, this isn't a hard rule because unique stories come up frequently, but if you can (esp. for commercial pitches) think of angles that make the idea more news-like versus a sales job. Google Trends and News can help.

#### **(3) Multiple voices:**

Many pieces need multiple, diverse and inclusive voices to tell a broader story. A good story idea often goes beyond one immediate viewpoint, so understand your perspective might end up being part of a larger story versus the whole thing.

#### **(4) Timeliness is often paramount:**

News lineups can change very quickly and most often are heavily based on the "happening now." A story may not work in a heavy news day, but if it isn't urgent frequently it can be used on quieter days. Be prepared if someone needs to circle back.

#### **(5) Avoid jargon:**

When emailing story ideas and in interviews, avoid industry-related jargon. Speak more casually for those who are totally unfamiliar with your sector, but be prepared to expand and get technical if needed.

#### **(6) Be ready with on-camera availability:**

Often, I see good story ideas, but when following up for an interview there are times when someone isn't available. When sending something out, have someone ready to speak on camera as soon as possible (especially in the mornings)

#### **(7) Think about visuals:**

With multi-platform reporting, visuals are essential. Make preparations ahead of time for journalists to get their own visuals for their stories as quickly as possible. Handout b-roll for most situations isn't a good practice.

#### **(8) Accessibility:**

Include various contact methods to facilitate a timely conversation. Personally speaking, I'd rather do a phone call than an email 9/10 times to avoid continuous back and forth. Also, be as available as you are for good news stories during more challenging times.

**(9) Keep story pitches as short as possible:**

For many journalists, myself included, we face a deluge of internal and external emails. With day-of filing, there literally isn't enough time to read emails top to bottom. Keep it as succinct as possible.

**(10) Contact assignment desks:**

Many of the staff who oversee assignment desks are on the ball with what's going on. Make sure you're contacting them early. Look for the contact pages on news sites (the generic news/story tip email addresses and phone numbers will get them).

**(11) Follow-up stories:**

Follow-ups to past stories can be valuable, but something to keep in mind is outside of a beat it's hard for general assignment reporters to do too many on the same thing. If it's a hot topic and can be advanced in a new way, that's a key consideration.

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## DOOR KNOCKING

Canvassing is the most effective tool campaigns have for identifying supporters!<sup>105</sup> It is a way to talk with potential voters directly, identify your supporters or persuade those that are undecided. Canvassing provides visibility for the campaign as it increases your name recognition as the candidate, thus creating momentum. Canvassing also allows you to confirm if the residents would be interested in having your sign on their lawns. Research has shown that voters are more likely to actually vote on Election Day if someone comes to their door.<sup>106</sup> Canvassing allows you to identify your supporters that you and your campaign can pull on Election Day.

Here are some tips on canvassing presented by OBVC at the Seat at the Table workshop in 2022:

### **Prepare a candidate toolkit**

Oftentimes, campaigning days are long and candidates must be ready to go door knocking at any point to meet voters and potential voters, especially when a group of volunteers are available to accompany you. It's a good idea to prepare a candidate toolkit available at the campaign office and in your vehicle which can include: a change of clothes, deodorant, various jackets for various weather conditions, extra shoes and shoes, hand wipes, hand sanitizers, an umbrella, lots of water, and snacks. Think about what else you would personally need to support you as you canvass door to door.

### **Dress for success**

Ensure that you and your volunteers are ready. Wear comfortable and presentable attire. Display the Candidate's button, t-shirt, and/or literature. Wear sensible shoes, and a happy smile.

### **Work as a team and strategize**

Although 200 doors takes a long time by yourself, going in in teams of 3 to 4 people makes canvassing more doable, safer, and enjoyable. It's important to plan your route, and track these completed routes back at campaign headquarters. While canvassing, fan out by doing both sides of the street and alternating houses. Although you are in a small group, only one person needs to be at the door. In addition, be aware of what time you are knocking. Only knock between 9:00 am and 9:00 pm on weekdays and 10:00 am and 6:00 pm on weekends. Sunrise and sunsets are also good indicators as people don't want you knocking in the dark. (Note that Canadian winters don't count as it gets dark earlier in the day during the winter months.)

## Some things to avoid while canvassing

- Don't cross over people's lawns
- Don't be confrontational
- Don't treat questions like a burden – they are an opportunity to tell your story
- Don't make up answers – its ok to get back to someone
- Don't partake in lengthy doorstep debates
- Don't pick up opponents literature
- Don't criss-cross streets
- Don't go into homes

## CANVASS TIPS FOR VOLUNTEERS

- Use the same canvas script
- Always introduce yourself and who you are canvassing for
- Leave material with voter.
- If no one answers the door leave material with “sorry I missed you” at the door
- Record all comments and any questions (not in front of voter though)
- Never get into an argument with voter
- Canvassers should be familiar with candidate's platform
- Wear proper clothing
- When doing apartments, advise the superintendent as a courtesy. Start at the top floor.

It's important to ask prospective voters if they will be voting for the candidate. Do not be shy! This is how you can determine if the resident is:

- **A supporter for your candidate** - who you can then ask if they would like a lawn sign or could volunteer,
- **Is undecided** - who you can help persuade through canvassing or giving more information, or
- **Not a supporter** - who you can mark on the sheet and could engage some more in future canvass if time allows.

Regardless of who you encounter at the door, it's important to listen and engage respectfully as you are representing your candidate. Do not engage in a long conversation, and never engage in a debate.

To be effective with canvassing door to door, it's also important for your campaign to set your objectives. For example, set a deadline date to have knocked on every single door in your constituency. Strategize on how you can do this effectively with the time and volunteers that you have. Similarly, train your volunteers and give them the tools they need to succeed. For example, give them a script, campaign literature, and smart tools to log their notes as a result of their door knocking efforts. On some of your campaign pamphlets, write "Sorry I missed you", with the candidate's signature. When left at homes, these pamphlets show residents that the candidate herself visited. Those canvassing with you can also have these cards and can leave them in good faith. Remember the purpose of canvassing is to identify your supporters and constituents who will be voting for you, identify sign locations and possible volunteers. So, ask plainly, "can I count on your vote", "can we put up a sign", "do you have time to volunteer on our campaign". All this should be documented so it could be input in your database.

## SAMPLE DOOR-TO-DOOR CANVASSING SCRIPT FO VOLUNTEERS



### Sample Door-to-Door Canvassing Script for Volunteers<sup>107</sup>

(Remember to keep this conversation short, leave a campaign flyer for the voter, and log results from your canvassing after your visit.)

**Step 1. Hi, My name is (the name of the canvasser). I'm doing a quick canvass of the neighbourhood today for (the Name of the Candidate and the position she is seeking). I wonder, have you heard about the candidate before?**

**IF YES:** Ask them where they heard of her, and share highlights about the candidate.

**IF NO:** Give a very short background to the candidate and the date of the elections, including when advance polls are open and the actual Election Day.

**Step 2. Could I ask, would you support (the Name of the Candidate)?**

**IF YES:** Thank the resident, and ask them if they would like a lawn sign, and if you can add them to the email newsletter. If they appear to be very supportive and engage, as if they would like to volunteer with the campaign. Ensure you leave them with a campaign brochure.

**IF UNDECIDED or NO:** Then you can move on to the next question.

**Step 3. What is your #1 issue in the area at the moment?**


Ideally, here your campaign has provided the top issues your volunteers might expect to hear. In this way, canvassers can pull on a bank of statements to show what the candidate stands for in this issue. Similarly, take notes so that a follow up can be made, if necessary. Thank them for their time and provide them with campaign literature.

**\*\*\* Remember to not have a debate with residents at the door**

## TELEPHONE CANVASSING

Telephone canvassing is an effective marketing tool used in political campaigns. One of the advantages of this approach is that a large number of people can be reached, and volunteers can make phone calls both from the campaign headquarters and their own homes. Campaigns can purchase phone numbers of individuals in their area. However, it's important to note that as more people only use mobile phones, it's possible that not every resident is listed in the database issued by the local phone provider.

Telephone canvassing before Election Day is focused on identifying supporters so that you can ask for lawn signs and determine if your voters need a ride to vote. Telephone canvassing can also be used to sway the undecided voters. On Election Day, telephone canvassing is primarily used to capture who from your identified voters list have voted, who has not yet voted, and who needs transportation to the polling stations.

 <b>Tips for a Successful Telephone Canvassing<sup>108</sup></b>	
What to say?	Resources Needed
<ul style="list-style-type: none"><li>● The canvasser's name</li><li>● Name of the candidate the canvasser represents</li><li>● What the canvasser can offer the person</li><li>● What the canvasser would like from the person</li><li>● An assurance that the information the person gives will not compromise the secrecy of their vote</li><li>● Remember, convey all this information in a friendly, honest and open manner</li></ul>	<ul style="list-style-type: none"><li>● Good telephone systems, technical set up and assistance</li><li>● A clear and east to follow script</li><li>● Proper training of canvassers and supervisors</li><li>● Committed staff who believe in the importance of voting and providing information to the public that will encourage them to vote</li><li>● Effective supervision of operators and where necessary retraining</li><li>● User-friendly mechanism for maintaining data and guaranteeing the confidentiality of information received</li><li>● Integration of EDI considerations when speaking to a diverse electorate</li></ul>





# SAMPLE TELEPHONE CANVASSING SCRIPT

The following is a sample of three variations of telephone canvassing scripts prepared by OBVC depending if the voter on the call is supportive of the candidate, is undecided, or is not supportive:

<p><b>Supportive of your candidate</b></p> <p><b>(Positive)</b></p>	<p>Hello my name is _____ and I am calling on behalf of _____.</p> <p>She/he/they is running for City Councillor/Trustee in your ward of _____ in the upcoming election.</p> <p>“Add one liner about the candidate” (e.g., She/he/they support(s) full funding for daycare etc).</p> <p>Can she/he/they count on your vote on Election Day? (Response YES) Thank you!</p> <p>Could we put a sign on your lawn? (Take note of their response and get details if Yes.)</p> <p>Would you be willing to volunteer? (Take note of their response, register the person on the call, and share when the next orientation will be held.)</p> <p>Do you need a ride to the polling station? (Take note of their response and get details if Yes.)</p> <p>Thank you for your time and support.</p>
<p><b>Undecided or Unknown</b></p>	<p>Hello my name is _____ and I am calling on behalf of _____.</p> <p>She/he/they is running for City Councillor in your ward of _____ in the upcoming election. “Add one liner about the candidate” (e.g., She/he/they support(s) full funding for daycare etc).</p> <p>Can she/he/they count on your vote on Election Day? (Response UNDECIDED)</p> <p>Okay, thank you.</p> <p>Her/his/their website is XXX. Please visit the site to find out more information about (add candidate’s name). Thank you for your time.</p>
<p><b>Not supportive of your candidate</b></p> <p><b>(Negative)</b></p>	<p>Hello my name is _____ and I am calling on behalf of _____</p> <p>She/he/they is running for City Councillor/Trustee in your ward of _____ in the upcoming election.</p> <p>“Add one liner about the candidate” (e.g., She/he/they support(s) full funding for daycare etc).</p> <p>Can she/he/they count on your vote on Election Day? (Response NO) Okay, thank you for your time.</p>

## CAMPAIGN SIGNS

# CREATING AND DEVELOPING YOUR CAMPAIGN SIGNS

Campaign lawn signs are a familiar and integral aspect of the political campaign process. They get your name out into the community and help build your name recognition. **While signs don't guarantee a win, it tells people that you are a serious candidate.**

Effective campaign signs are generally simple in design. As municipal elections are predominantly on a non-political party basis, you and your team have less restrictions on your sign design. Would it be beneficial for you and your campaign to have colours similar to the traditional party politics signs, or is it better to steer clear from these styles and colours to ensure independence from existing political party structures? This decision is up to you and your campaign's strategy.

Aside from keeping the text clear and easy to read, it is also important to think about the colours chosen on the signs. Consider high contrast colours to increase accessibility and readability. Minimize the amount of text included on the signs. What can be on campaign signs, as well as where they can be placed and when is also dependent on municipal by-laws. For example, in Winnipeg, municipal by-laws dictate that campaign signs must include the contact information (name and telephone number) of the person who has placed or requested to have the sign placed in that location, as well as the date it was placed there.<sup>109</sup> Campaign signage is permitted along highways in Saskatchewan.

However, specific rules regarding how close to the road it can be and what is on it must be followed.<sup>110</sup> In addition, be mindful of using any logos or symbols that are used by your city/town or any suggestive appearance as this is strictly prohibited in some municipalities such as Moose Jaw.<sup>111</sup> Lastly, in many municipalities, your campaign sign will be required to have an "authorized by" statement on the front of the sign. It's important to understand all the local requirements regarding signs for your local area as campaign signs require a significant investment from your campaign funds. As such, you do not want to be in the position of needing to re-print your signs because of an error during the design phase for being out of step with local rules.

Another aspect to keep in mind is that campaign signs are placed outdoors – typically on voters' lawns or at the side of the road. As such, think about your local weather conditions and ensure that your signs are weatherproof and sturdy, including the wooden or metal stakes used to set them in place. Part of the task in distributing signs is replacing broken or damaged signs throughout your community. As such, the sturdier the signs, the less time needed for maintenance and upkeep.

Lastly, it's also important to decide how many signs you will create to have sufficient coverage in your community. Is it more cost effective to print a lot, or is your printer flexible to have smaller batches throughout the campaign?

If you choose the latter, think about the turnaround time. How quickly are they produced from the time the signs are ordered?

You and your team will need to make these decisions based on your campaign budget, and campaign timelines.

## Creating Campaign Signs

Include	Avoid
<ul style="list-style-type: none"><li>● Your first and last name</li><li>● Contact information</li><li>● Authorization message</li><li>● Your photo (optional)</li></ul>	<ul style="list-style-type: none"><li>● Too much text</li><li>● Bright/clashing colours</li><li>● Symbols/logos associated with the municipality</li><li>● Anything that would be reasonably deemed distracting to drivers</li></ul>

## COORDINATING AND DELIVERING CAMPAIGN SIGNS

As shown above, ask supportive voters if they would like a campaign lawn sign whenever you and your team are out canvassing. Similarly, don't forget to ask your volunteers and ensure that they have a lawn sign if they live in your catchment area.

If you are able, assign a volunteer to be the Sign Chair/Coordinator who will be in charge of strategizing the locations of your signs, coordinate the delivery and installation of the signs, lead and coordinate the sign repair crew, and pick up the signs at the end of the campaign. Ensure that there is a clear process between canvassing and the sign delivery so that voters are not waiting a very long time between when they said yes to a lawn sign to when the sign is actually installed.

This aspect of the campaign will also require volunteers with vehicles and tools, and since they are driving around the neighbourhood, they are also able to monitor any broken or damaged signs.

Lastly, check your local municipality with regards to the rules of where and when signs can be installed, including the requirements of when all signs need to be collected and cleaned up post-campaign. Similarly, this team will lead the clean-up of the signs after they have been returned so that they can be put into storage for subsequent elections.



## WRITING TWO SPEECHES: YOUR CONCESSION AND VICTORY SPEECH

There are many opportunities for you to provide a speech during the campaign such as at your fundraising event, your candidacy announcement, or at a local event such as a community BBQ or festival. Ensure that you have your main speaking points so that your messaging remains consistent throughout the campaign. If you're able, work with your campaign manager and communications director/advisor to create these speeches unless you have a speech writer as part of your (volunteer) team. Regardless of the number of speeches you prepare and deliver during the campaign trail, there are two particular speeches that every candidate needs to write where only one is delivered, and that is your concession and victory speech.

A concession speech is what “a candidate delivers after the vote results are clear when they publicly acknowledge that they've been defeated in an election. These speeches are typically delivered in front of supporters, and when they're at their best, are well-choreographed political events” (Goddard Media LLC, 2022). What's important here is thanking your supporters and congratulating the winning candidate as graciously as possible.

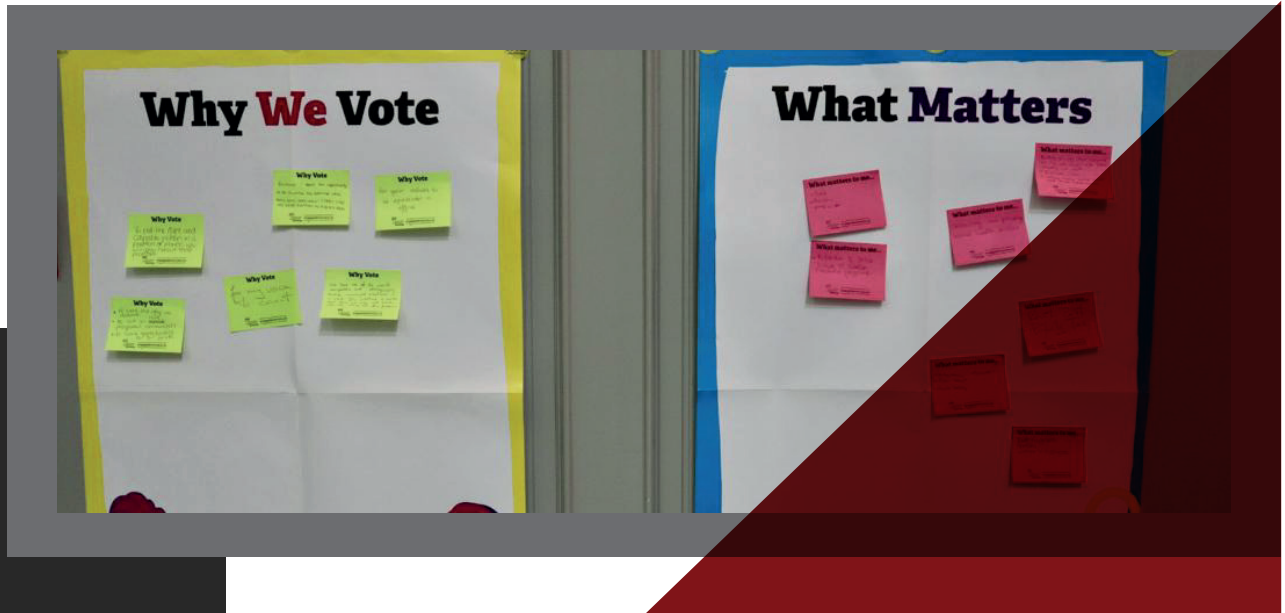
On the other hand, a victory speech is more a joyous occasion, and should celebrate your campaign team, many supporters and your successful campaign. Similar to the concession speech, extend your sincerest thanks to your family and volunteers, send a gracious message to the other candidates who participated in the democratic process, and thank and extend your recommitment to your voters and all your constituents – both those who voted for you and those who voted for another candidate. Take a moment and acknowledge the hard work that has come to fruition during the campaign trail and inspires and informs the hard work of governance that lies ahead.

**The following is a summary of the traits of victory and concessions speeches<sup>112</sup> you can consider as you develop your own:**

Traits of a victory speech	Traits of a concession speech
<ul style="list-style-type: none"> <li>● Thank your volunteers, your campaign team, your supporters, and your family</li> <li>● Acknowledge the other candidates and their teams, and for their engagement in the democratic process</li> <li>● If any of the other candidates called you to concede, mention it.</li> <li>● Tell a story of an interaction that summarizes the campaign trail. Highlight the positives.</li> <li>● Reaffirm your commitment to all voters, and the vision you have been sharing throughout the campaign</li> </ul>	<ul style="list-style-type: none"> <li>● Be brief (no more than five minutes long)</li> <li>● Show humility, be generous and pledge support to the winning candidate</li> <li>● Acknowledge your opponent's victory, the will of the people, and the democratic process</li> <li>● Thank your own supporters</li> <li>● Restate your commitment to help in the community</li> </ul>

## ELECTION DAY

### GET OUT THE VOTE! (GOTV)



## ADVANCE POLL

Before we get to the ACTUAL election day, you will have an opportunity to practice getting the vote out during the advance poll days. The length of advance polls varies. However, it is an opportunity for residents to vote early either because they are not available on election day or they want to avoid the rush.

Either way this opportunity for your supporters to vote early. You should also encourage your volunteers to vote in the advance polls so that they could assist you on election day (E-day). To prepare for the advance polls contact all your supporters especially those have requested a ride to see if they would like to vote in the advance polls. The goal is to get as many people on your supporter list to vote in advance so you have less people to pull out to vote on E-day.

## ELECTION DAY

The day is finally here: Election Day. The campaign trail culminates at this point, and the main task on this day is to get your voters to cast a ballot or in other words, "Get Out the Vote!" (GOTV).

Prepared by OBVC (2022) for their Seat at the Table workshops, the purpose of GOTV is turning out and encouraging your supporters and constituents to vote on Election Day. The campaign headquarters needs to be fully stacked with volunteers, calling people to remind them to vote, answering their questions if they do not know their polling stations or the time that voting is open for, and finally offering and coordinating rides to and from polling stations.

Getting out the vote is the only and prime objective on Election Day.

As an aside, it is also important that before Election Day, that all of your volunteers have voted at the advanced polls. It goes without saying that every vote counts!

**GOTV** effort is about canvassing and calling identified supporters and **IGNORING** potential or undecided voters, as identified previously by the campaign's canvassing efforts. As a campaign team, it is important that these databases and information are ready to go the night before the election. The goal is to do whatever it takes to get your supporters at the polls. If the identified supporter doesn't vote after 1 or 2 telephone contacts, and if you have the volunteer capacity to do so, send someone to their homes **UNTIL THEY VOTE**.

It is also possible that aside from the campaign headquarters, satellite **GOTV** centres may be set up at various volunteer homes across your jurisdiction. This is so that you can plan and divide a larger area into smaller centres, so that it's easier to coordinate driving supporters to and from the polling stations.

## SAMPLE E-DAY GOTV CANVASSING SCRIPT

### Sample GOTV Script

Hello, is [VOTER NAME] there?

Hi! This is [CALLER NAME] calling from [LOCAL STREET, TOWN, PHONE BANK LOCATION, COUNTY, STATE].

Official records show that you voted in the 2008 election and we are calling voters like you to say, thank you.

Thank you for being a voter! (pause)

Since you are the kind of person who votes and cares about the community, we wanted to remind you about the election on Nov 2nd. [INSERT PERSONALIZED ELECTION SENTENCE].

Can we count on your vote on Nov. 2nd?

Great! We are calling people in [COMMUNITY NAME] and it looks like a lot of people will be voting this year. It is an exciting race, but it's going to be close and your vote can make the difference.

I have that your polling place is at [POLLING PLACE]. Is that close. enough to walk? Or will you drive or take the bus? (pause)

On Election Day, your polling place is open from [XX AM TO YY PM]. Do you know when you might go to vote? In the morning, afternoon, evening? (pause) So do you think you'll head to the polling place from your home, work, or somewhere else?

Great! Again, thank you for being a good citizen who votes, and for your promise to vote this year.

We hope to be able to thank you again for voting on Tuesday, November 2nd

#### Key elements:

- ✓ Localness of caller
- ✓ Voting is public record
- ✓ Identity Labelling
- ✓ Voting is positive
- ✓ Commitment to vote
- ✓ High turnout
- ✓ Agency
- ✓ Plan making
- ✓ Thank you for voting
- ✓ Hope to thank you again

# SAMPLE RIDE REQUEST FORM

## Ride Request

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

Phone (Home): \_\_\_\_\_ Phone (Work): \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Directions/Special Instruction: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Number of People to be Transported: \_\_\_\_\_

Poll #: \_\_\_\_\_ Location of Polling Station: \_\_\_\_\_

\*Remember apartment number or buzzer code, if apartment or condo.

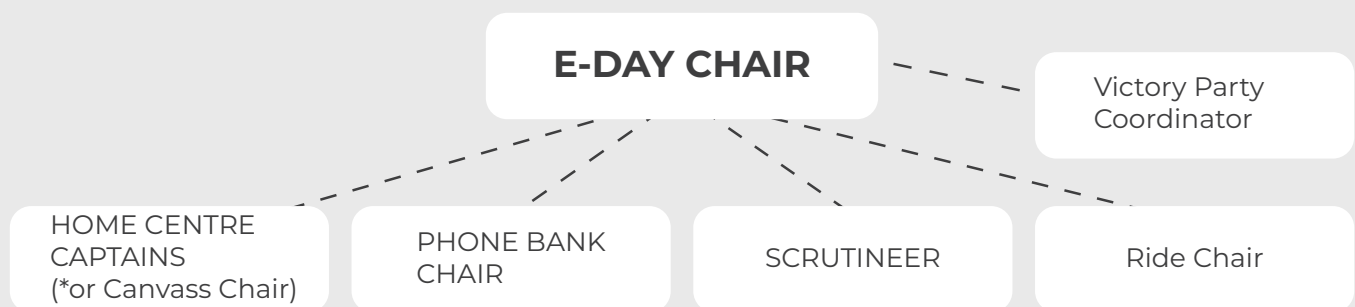
## NOTES :

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## PREPARING FOR ELECTION DAY (E-DAY)<sup>113</sup>

Preparing for Election Day and for your GOTV strategy starts on day 1 of the campaign. It is the main goal and purpose of your campaign efforts. Your role as a candidate, or more preferably the role of your campaign manager is to appoint one person to oversee the GOTV operation. They are the E-Day Chair or GOTV Director.

The E-Day Chair oversees the entire planning and operation of GOTV and coordinates between legal/election officers, campaign manager, and candidate. Similarly, the E-Day Chair coordinates with home centre captains or those satellite GOTV home-based and neighbourhood-based centres, the phone bank chair who coordinates the phone canvassing, the ride chair who coordinates arranging transportation of voters to and from polls, the scrutineer team during the vote count, and the victory party coordinator at the end of E-Day.



## THE ROLE OF THE GOTV DIRECTOR / E-DAY CHAIR

The E-Day Chair is responsible for:

- Deciding on the number of home centres (if any)
- Assigning and training the home centre captains.
- Oversee the preparation of polling packages.
- Inviting, scheduling and training volunteers.
- Arranging logistics and resources.



## WHAT HAPPENS ON E-DAY?

In general, this is an overview of what happens on E-Day:

1. Home Centres pick-up Home Centre Kits and set up their home centres, and Campaign HQ is geared up to go.
2. Volunteers arrive at the home centres\* and/or at HQ.
3. Volunteers check polls are open.
4. A team of volunteers complete a literature drop in the neighbourhood.
5. Phone canvass begins with identified supporters.\*\*
6. First round of door knocking of identified supporters.\*\*
7. Second round of door knocking.\*\*
8. Third round of door knocking.\*\*
9. Voting polls close, and HQ shifts to preparing to receive the vote counts from scrutineers and prepare for the campaign party.
10. Scrutineers witness the poll counts and call in the count results to HQ for tabulation.
11. Results are known and the candidate provides either a victory or a concession speech.
12. Campaign Party!\*\*\*

\* Many municipal campaigns do not have several Home Centers. Having a central location where you volunteers can meet to pick up literature, refuel and celebrate on election night is ideal.

\*\* Note that the purpose of the telephone canvassing and the door knocking is to remind supporters to vote, coordinate rides if they need transportation support to vote, and to update the supporter database throughout the E-Day. Updating the database is important so that efforts are not wasted with calling or door knocking to a residence that already voted.

\*\*\* Regardless of the election outcome, it's important to celebrate your team and volunteers. They are your community and the people who dedicated their time and money to support you throughout the campaign. Ensure that you have the bandwidth to be with your volunteer team at the end of E-Day.

## SAMPLE E-DAY SCHEDULE

Here's a sample E-Day Schedule you can base your planning on:

**8:00 AM** Core team meeting/ instructions for home centres or campaign headquarters

**8:15 AM** Campaign office: Captains leave with kits to open home centres/staging locations

**8:45 AM** Undistributed "U-vote at" cards start to be delivered

**9:00 AM** GOTV manager calls each Home centre Captain or campaign headquarters to see if locations are open and operational

**10:00 AM** Polls open undistributed "U-vote at" cards start to be delivered/ Legal counsel inspects each polling location to ensure they are open and there are no issues

**10:00 AM** Canvass teams go out for first pass

**10:30 AM** Runners dispatched to get the first wave of bingo sheets. As Bingo sheets return, the Staging Location Captain strikes off lists and data entered after the sheets are marked off. System repeated every hour or as needed

**11:00 AM** Update from Home centre Locations or campaign headquarters

**11:30 AM** Lunches delivered to Home Centre Locations or campaign headquarters, as well as scrutineers

**12:00 PM** Canvass teams return from first pass

**12:15 PM** Canvass teams go out for second pass (Repeat until close of polls)

**1:00 PM** Check in with Home centre Locations captains or campaign headquarters

**4:00 PM** Rush (walk in volunteer) begins, volunteers should be sent to understaffed Home Centre Locations

**4:30 PM** Dinner delivered to Home Centre Locations

**6:00PM** Small team leaves to set up Election Night Party (EDAY not advance polls!)

**6:30 PM** Blitz voters prioritized

**7:00 PM** Cell phone telephone canvass starts

**7:30 PM** Scrutineers sign in to Polling Locations for the count 8:00 PM Polls Close and count begins

**8:30 PM** Counts start to flow to HQ

**9:30 PM** Count tally team joins rest of team at Election Night Party



## E-DAY HOME CENTRES

In general, you and your core campaign team need to consider the following factors when deciding about E-Day home centres:

- **Number of supporters and voters in the area,**
- **Number of polling locations, and**
- **Number of available volunteers and resources.**

When deciding what sites to identify and use as Home Centres, consider the following about the sites:

- **Is accessible and visible, including physical accessibility.**
- **Close to public transportation**
- **With at least one bathroom**
- **With parking spaces available**
- **Has power, heat, and internet,**
- **Has privacy and is secure**
- **Has relevant supplies including:**
  - Polling packages
  - Food and water for volunteers
  - Pens/pencils (depending on weather)
  - Volunteer and canvass chart

## HOME CENTRE KITS

As part of E-Day preparation, the campaign must meticulously prepare Home Centre kits. It's important that accurate information are placed in these kits to ensure no confusion occurs while executing the plan on E-Day. The Home Centre kits include the following:

- **Home Centre Map**
- **Voting Station List**
- **Volunteer List**
- **Candidate Authorization forms**
- **Contact number duplicate poll kits (backup)**
- **Flyers/door knockers**
- **Canvass Wall Chart**
- **Weather appropriate supplies (ponchos, warmers etc.)**
- **Water, juice, snacks etc.**
- **Canvass and Scrutineer Kits**
- **Supplies such as pencils, highlighters, post-it notes, snacks, garbage bags, paper towels and toilet paper.**

## WHAT HAPPENS AT HOME CENTRES ON E-DAY?

**In general, the following events can be expected to occur at the various home centres on E-Day:**

- The Home Centre captain sets up the space in preparation for volunteers arriving
- Volunteers arrive and sign in (collect names and phone numbers)
- Volunteers are trained and given instructions (although ideally this will be a refresh and that the volunteers received a full training prior to E-Day)
- Home Centre captain assigns them a poll (use sticky note system).
- Home Centre captain provides them with a scrutineer kit.
- Provide volunteers with water/snacks if needed
- Activate canvassing for your assigned area
- Report back on data and update your GOTV database

## SCRUTINEERING

Scrutineers are important volunteering positions on E-Day. Ideally, you have enough volunteers to have a scrutineer at each polling station throughout the day, although this is not often the case given all the different roles and needs during E-Day.

The main role of scrutineers is to observe, without interfering with, that polling locations are opened and closed at the appropriate time. They also observe that lineups are running smoothly, without interfering. Scrutineers are the campaign's eyes and ears at polling stations. As such, they need to report back any suspicious activities, intimidation, or issues facing voters back to their campaign HQ or Home Centre captains who can centrally address the matters through the campaign's official agents. Scrutineers can also collect evidence of any of these alleged irregularities, if necessary, such as photos or videos, emails or material being distributed illegally at the polling stations during E-Day.

Again, the goal for E-Day to Get Out the Vote. The role of scrutineers is very important as they have access to and can collect the updated voters list/vote count throughout the day, which needs to be provided/harmonized into the identified supporters database to ensure that the campaign canvassing efforts are informed as to which identified supporters have not yet voted.

At the closing of polls, scrutineers are not able to leave until after the vote has been counted. Once the results are known for the polls, scrutineers can call in the vote count, typically to campaign HQ so that a tally of all the polls are counted and the campaign can monitor the results in real-time. Again, as there are many more polls as there are available volunteers, scrutineers watch the count in key strategic polls depending on available volunteers.

## CANVASS/SCRUTINEER KIT

**In general, the campaign must prepare the following components to be included in the canvass/scrutineer kit for distribution to volunteers on E-Day:**

- Instructions
- Canvass Script
- Candidate Authorization form
- Contact Numbers
- Voters List/List of supporters
- Building Access Memo (e.g., for condominiums and apartment buildings)
- Directions from the Home Centre to the polling location
- Sample spoiled ballot
- Tally sheet
- Election Day flyer/Door Knocker

## E-DAY MANAGEMENT CHART

As mentioned above, use a post-it note system to track the name of the volunteers assigned at particular polling stations. You can use the following E-Day Management Chart to track the assignments of volunteers across the polls that you are looking after.

- Use post-it notes to track name of volunteer and contact info.
- Fill in priority based on poll, highest number of voters and supporters.
- Simple way to track what needs to get done.

### E-DAY MANAGEMENT CHART ZONE 1

	Polling Station 1 123 Fake Street			Polling Station 2 456 Fictional Avenue		
	10 45	11 62	12 20	16 11	17 46	18
DROP	✓	✓	✓	✓	✓	✓ 30
D2D 1	✓	✓	✓		✓	Bobby 555-4167
D2D 2					Susie Smith 555-4567	
D2D 3						
COUNT						

## E-DAY SCRUTINEER SIGN-IN

Similarly, you can use the following E-Day Scrutineer Sign-In form to track where your scrutineers are at any point during E-Day:

ID #	Name	Cell #	Poll #	Time in	Time Out
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

## SCRUTINEERS AT THE FINAL VOTE COUNT

Scrutineers are your and your campaigns official representative at polling stations, and this becomes critical during the final count after the polling stations are officially closed. Typically, here are the steps that scrutineers must go through to be present at the final count at the polls they've been assigned to:

- Sign in
- Watch for questionable markings during the count
- Question and watch out for a spoiled ballot, especially if it's a ballot that voted for you  
Cannot and should not touch ballots
- Record results (e.g., Write down poll # and votes for each candidate on tally sheet provided in the Scrutineer kit)
- Seal packages
- Call in results (Be patient and keep it short)
- Head to the victory party where you will drop off your poll kit(s) (Note that this may be directly at the Campaign HQ and not at the Home Centres)

### NOTES :

■	_____
■	_____
■	_____
■	_____
■	_____
■	_____
■	_____
■	_____



## AFTER THE ELECTION

### LOGISTICS AFTER THE ELECTION AND CAMPAIGN

The election is over and now, regardless of whether you have won or not, there are several logistical elements to complete in order to officially wrap up your campaign. First, determine if a recount is necessary. If it is, check with your municipality regarding the recount process, mindful that there is usually a limited timeframe for this process.

If no recount is required, it is time to begin finalizing your campaign's financial statements. Ideally, your Chief Financial Officer or Official Agent has kept up with tracking the income and expenses of your campaign as well as the donor list with the help of your core campaign team members. Whether you win or lose the election, submitting your financial statements is mandatory to ensure compliance to election rules and legislation.

Each municipality will have its own forms, processes and specific deadlines for submitting financial statements (or financial disclosures). Consult your local government to ensure that you are using the correct forms and submitting the required paperwork by the stated deadlines.

If you have excess campaign funds, contact the election financial officer or appointed official to determine where those funds should go. Ensure that final payment and any necessary financial documents are sent to all paid campaign staff and check your municipal financial rules regarding the process of closing your campaign account as some jurisdictions may need an audit or their approval before you can officially close and dissolve your campaign bank account.

You and your campaign team will also need to close and vacate your campaign office if one was rented. The other time-sensitive logistical requirement after the election is the time specified to collect all of your lawn signs and collect all of your campaign materials and remove them from public circulation. Some municipalities, such as Toronto, require campaign signs to be removed within 72 hours of an election while signs on private property and displayed by a third party are the responsibility of those individuals.<sup>114</sup> To clean up your campaign signs, you will still need your Sign Coordinator and that team for assistance to collect all the lawn signs, clean them up and prepare them for storage for future elections where the signs can be reused.

Note as well that removing campaign products includes campaign websites and campaign social media accounts. Although most take down their websites, social media accounts can be repurposed especially for winning candidates by simply changing the name of your social media accounts to clearly stating that it's the Councillor's or Mayor's social media account rather than the campaign equivalent.

## SELF-CARE AND MENTAL HEALTH

### WHEN YOU'VE JUST BEEN ELECTED

Congratulations! You have completed an enormous undertaking – you won an election! You inspired voters and volunteers. You met hundreds of people, spoke with them and shared yourself with every conversation and interaction.

Take some time to be proud of what you have achieved and celebrate the success of you and your campaign team! This may be the end of the campaign and election, but it is just the beginning of your work as an elected official and a community leader. It is important to give yourself the chance to rest and reconnect with family and friends, as well as yourself who may have taken the backseat during the campaign trail. Catch up on sleep and turn off the news and social media. Although it is an exciting time, it's also important to recharge in order to start from a place of strength.

When you are ready, in addition to the logistics (see above) of closing your campaign and thanking all of your volunteers, you will need to begin preparing to officially take on your new role. Continue with your core campaign team and invite them to help you transition to your official role, at least temporarily until permanent staff are put into place.

### WHEN YOUR CAMPAIGN WAS NOT SUCCESSFUL

#### **Losing an election is tough.**

Campaigns are something you've put a lot of work and resources into for the opportunity to work for your community. You and your team have poured your time, energy, heart, skills, and talent into this endeavour. It is important to acknowledge that there is a sense of grief that comes with this loss and to be kind to yourself. Know that you are not alone, however. Your campaign team, volunteers, your family, and supporters have been with you throughout this journey. Take some time to celebrate the effort everyone has contributed to your campaign. Take time to reconnect with family, friends, and yourself but also acknowledge that you can and should take some time to be alone to rest and reflect on the experience. Before going through the next steps of formally ending your campaign, step away and take some time for yourself.

When you are ready, you can continue with the next steps of this process including officially closing off your campaign with the necessary logistical components outlined in section 2.32. Consider setting up a meeting to debrief about the campaign and election with your core campaign team, and review what went well and what could be improved. Take time to consider what your next steps will be but take some time before you settle on decisions regarding the next election. If you have encountered challenging and potentially harmful situations during the campaign, we encourage you to find confidants and allies to work through this pain, whenever you are ready emotionally and psychologically. There's no need to rush. Your wellness and longevity as a community leader is more important.



**OPERATION** BLACK **V** OTE  
CANADA