

Edited by Candy Piercy & Mark Pack

‘Winning Ways!’



The 2017 General Election Agents Manual

Dear colleague,

Welcome to the latest edition of the General Election Agents Manual, specially updated for the 2017 general election and which should be used in conjunction with the General Election Compliance Guide from Liberal Democrat HQ.

Please tell every agent you know – and candidate – to come and have a look. This guide is primarily written for agents, but others closely involved in the Parliamentary election (such as candidates and key activists!) will find it useful too.

As with every new edition, we have covered recent changes in election law. Even the most experienced agent cannot rely on their experience of previous elections. Too much changes each time.

It is not possible to include every single aspect of running an election in these pages. What we hope to have done is to give you a good working knowledge of election law. If in doubt, please ask someone at ALDC or Liberal Democrat HQ (who knows about current election law!) for another opinion. More help numbers will be circulated soon.

This Manual also provides a basic 'survival' information for the agent, candidate and other members of the campaign team. There are lots of useful tips on how to run a successful General Election Campaign.

Please make sure that Lib Dem HQ knows who the legal agent is in your seat. You can do this at <https://goo.gl/forms/vSmNhwrAoekljy2B3>

Key contact details are on the next page.

We would like to wish you the best of luck for all the elections you may be involved in and most of all, enjoy yourself!

Best wishes,



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Last updated: 25 April 2017.

P.S. Updates to this guide may be issued during the election, so keep an eye on where you got it from for any new editions.

Key contact details

Association of Liberal Democrat Councillors and Campaigners (ALDC): 0161 212 1012 / info@aldc.org

Liberal Democrat Party HQ (LDHQ):

020 7222 7999 / help@libdems.org.uk

This where the party's Compliance Department is based. See the flowchart in the appendixes to find out who best to contact.

Useful Facebook groups

- Association of Liberal Democrat Councillors
- Connect Users
- Lib Dem Campaigners
- Lib Dem Digital Campaigning Forum
- Lib Dem NationBuilder Users
- Lib Dem Newbies UK
- Membership Portal Users

Acknowledgements

Over the year many people have helped with previous versions of this manual. Our particular thanks go to David Allworthy, Caron Lindsay and Tim Pickstone for their help in updating the most recent editions.

Feedback

Please do let us both have feedback on this manual, especially any sections you found hard to follow and any tips you think would be useful to add: candy@candypiercy.org.uk and mark.pack@gmail.com

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1. Top tips

We cover more on these tips throughout the manual, but here is a convenient summary of the main tips to get you started.

1. Check the election timetable (see appendixes) and make a note of the key legal deadlines, such as submitting nomination papers.
2. Contact your local Electoral Registration Officer (ERO), set up a meeting with them and get from them their set of paperwork – nomination forms, timetable etc.
3. Calculate your election expenses limit, keep every receipt and keep a running total of how much money you have spent.
4. Write a campaign plan and budget ASAP.
5. Check who the Delegated Nominating Officer (DNO) is for your local party so you can get their signature to authorise the use of the party's name and logo.
6. Get an agent's bank account opened if you don't already have one.
7. If anyone threatens to sue you or makes any other legal threat, use the flowchart at the back of this manual immediately to work out your next step.
8. Read this manual and keep it close at hand throughout the campaign. You never know when you might need to consult it.

2. Role of the agent

An election agent is the person with full legal and practical responsibility for running an election campaign. They are responsible for all the financial transactions and the submission of all the legal documents required before, during and after the campaign.

In practical terms, the agent is responsible for making sure:

- There is a Liberal Democrat on the ballot paper – by successfully submitting the nomination papers and other paperwork.
- The campaign on the ground happens (leaflets, canvassing, online campaigning, helping in the nearest target seat if you're not in one yourself, and so on).
- The campaign keeps within the law and that all the relevant official paperwork required aside from the nomination also is done properly, including the election expenses return after the election.

This does **not** mean the agent must do every single task themselves, but rather they must make sure all the tasks are carried out as planned.

Almost all campaigns have a team of people who help with various tasks, and it is common to have a "campaign manager" who looks after the delivery of the campaign while the agent focuses on the legal side.

The agent, however, retains overall control and responsibility — and some tasks **must** be done by the agent:

- Filling in and signing official paperwork and forms, and getting them submitted to the appropriate person by the official deadline.
- Authorising any expenditure of any kind on the campaign.
- Recording all donations of over £50 made to the campaign and declaring them in your election expense returns.
- Paying bills and making sure the campaign does not overspend either its legal limit or available budget.
- Approving the content of literature (paper or electronic).

We will cover these points in more detail later in this manual.

The buck stops here

If anything goes wrong during the campaign, the agent is legally responsible. This is still the case even if the agent had no knowledge of the events leading up to the problem. For this reason, election campaigns cannot be run on a democratic basis. The agent is in sole charge and has the final say on **all matters** to do with the election campaign.

This is particularly important in relation to money. Anyone who does not accept this point cannot be allowed to take a significant part in the campaign. You may find it useful to give a copy of this section to anyone who has any doubts as to the extent of the agent's role and responsibilities.

This can all sound daunting. However, if you keep this manual to hand and follow the guidelines given, you will find the task assumes manageable proportions.

Never be afraid to ask for help if you are in any doubt about the legal position you find yourself in: 99.9% of the time the problem will be more easily solved than you feared, but 0.1% of the time that call will be vital.

Also – very importantly – if you genuinely try hard and competently to follow the rules, then if something happens for reasons completely outside of your control, you have a good defence. But only if – which means you cannot take on the role of the agent on the basis that someone else will do the work. You need to do the work yourself.

It is also therefore generally unwise for the agent to be a lawyer, magistrate (or author of election law advice!). This is because if they make a mistake, the courts are likely to be far harsher on them than they would be on a layperson.

Finally, although being an agent is an important, responsible role, remember that thousands of your colleagues have successfully been agents in the last few years alone. It is important to do the job right, but have confidence too that you can manage to do it right.

Appointment of the agent

The candidate has the sole right to appoint his or her own election agent. If there is a constituency agent/organiser it often makes sense to appoint them. If someone else is appointed, the candidate and agent should take good care to ensure the local party executive, local councillors and others are happy with the choice and know about it.

Preference vary as to whether it is best to have the same agent for both local and general election if they are happening on the same day in your area. Combining the roles makes much of the administration simpler but can also be very time-consuming.

An agent is usually “appointed” twice. Once in advance of the election when the candidate agrees on who their agent will be. Then formally, when the legal form for appointment of an agent is handed is along with the candidate’s nomination paper just before the start of the final stretch of the campaign.

When you are appointed as legal agent, you must declare the address to which correspondence is to be sent. This address does not need to be your home address, but it must be in the constituency where you are an agent or in an adjoining one.

How much time does being the agent take?

Just like with being a candidate, how much time it takes depends on how intensively the campaign is being fought.

The legal deadlines cannot be missed under any circumstances.

Planning ahead around the key deadlines is vital – as however important the other calls on an agent’s time may be, there are legal deadlines which must be met come what may.

Remember to pace yourself

You must have sensible amounts of sleep and food to keep you operating efficiently. You must delegate. If you do not have enough people to help you run the kind of campaign you have planned, you must look at that plan again. **Then cut it down to a manageable size.**

However small your campaign team, you will need a trustworthy assistant. If you are trying to answer the phone, design the next leaflet, help a local resident who has called in for advice and plan your next step in the campaign all by yourself, you won’t make it past the first 24 hours, let alone past polling day!

Remember too, that the job does not stop when the result is declared. There are still the bills to be paid and the election expense returns to fill in and submit.

Be realistic about your strengths and weaknesses

Sit down and look at your own abilities – not how much you know about election law, but about your own personal capabilities.

Are you good at starting things but bad at finishing them off? Are you good at motivating people? Do you get cross when people don't do exactly what you want them to? Are you brilliant at running Connect – or are your computer skills basic? How confident are you about using social media?

Make the most of your strengths and compensate for your weaknesses. Who can you ask to help with which roles? What area should you read up on or do some training in to brush up your knowledge? There is great support available in the Facebook groups listed at the start of this manual.

Coping with the pressure

Agents must be able to remain calm and in touch with reality. You may need to take sensitive and important decisions under extreme pressure throughout the campaign. Clearly, if you are overtired and overstressed you may have a problem keeping events in perspective.

From the word go, everyone in the team must understand that the agent is in charge.

This does not mean you should not listen to other people's opinions – far from it. If there is time, you should listen to as many people as possible, then make up your own mind. Never panic or show outward signs of weakness and **never** argue with key workers or the candidate in front of anyone else. If you look calm and in control, your team will have confidence in your decisions.

Give yourself time to think, especially in a crisis. Kneejerk reactions are dangerous, especially in relation to the press, financial or legal issues.

Every campaign is full of people, convinced they know better than anyone else about how everything should be run. Stay calm and don't get into an argument if you can avoid it. If someone starts to wind you up, find them a useful and constructive job which keeps them out from under your feet.

Remember also, that while there will be wise people with good advice, election law also often brings out people who think they are expert – but are not.

Make sure you have a network of people whose judgement you can trust that you can ask for advice. The internet makes this much easier than it used to be, whether it is sending off a quick email or asking a question in one of the excellent Facebook groups run by ALDC (for ALDC members) or Liberal Democrat HQ.

This is particularly valuable if you have not been an agent before but both of the authors of this book still find such support really helpful even after many decades of fighting elections!

Similarly, if someone asks you for help or advice – remember how much they may value a few words from you.

Prepare for the pressure in advance

Many agents take a few simple preparatory steps in advance:

- Buy gifts and cards in advance for birthdays, anniversaries etc. that come up during the election campaign itself.
- Make sure all your bills are up to date, especially any that aren't on automatic direct debit payment.
- Stock up on non-perishable, quick to cook healthy food such as frozen vegetables so that you can carry on eating (reasonably!) healthily even during the most stressed moments.
- Make sure you have your list of people to turn to for advice in a moment of stress.

Keeping track of money

The agent is the only person involved in the election who can authorise spending money or pay any bills – and must ensure the expense limit is not breached.

Accurately tracking the finances of the campaign is vital for three reasons.

First, all the bills will need paying and there is no magical pot of money from someone else to sort this if income and expenditure end up out of kilter.

Second, win or lose the campaign finances need to be recorded and legally declared in an election expenses return form after polling day. Failing to do this or getting it wrong is a legal offence.

Third, there is a legal limit on how much can be spent on a campaign. This must not be breached in any circumstances.

If you spend more on the campaign than your legal limit, you are committing a criminal offence.

Later in this manual, we talk in more detail about setting up bank accounts. But the key point is a simple one:

Use a dedicated bank account for election agent activities and have the agent as the only signatory on the account.

Using a dedicated bank account keeps the campaign finances separate from your personal finances, which is an important guard against making mistakes or overlooking an item. It also makes handling any legal queries much easier (and preserves more of your privacy). The agent must be the only signatory because they are the one person legally responsible. If you are an agent for multiple candidates, it is fine to use the same bank account for them all.

This manual also goes on to talk about how to come up with a campaign plan and budget. Keeping track of your expenditure is a key part of the job of an agent – and it can be one of the most difficult. It is vital not to lose track of how the money is being spent and what donations have been received.

You should do your accounts every day of the campaign.

It is sensible to get into a routine. Most agents find it easiest to do the accounts last thing in the evening. Then they can get to sleep easily! Others find it easier to come in half an hour before anyone else in the morning. Then they can peacefully do the accounts from the day before and be confident how the spending is going.

Writing everything down every day helps you keep track of what you have committed financially, including where you are against both budget and expense limit.

Keep a running total of how much is in the bank at all times.

It is often the smaller sums of money which are the most difficult to keep track of. Petty cash needs to be controlled with care. It is amazing how much can be frittered away during a campaign if you are not careful. You need a petty cash receipt book and a cash box. You must keep all receipts for your records. Cash small cheques from the election account to top up the box once or twice a week if needed.

Continuing local party business

The agent is in control of the election campaign, including all expenditure. However, some other local party activity may continue – and some activity is even legally required, such as checking and recording donations made to the party rather than to a specific campaign.

Therefore, the local party executive should pass a formal motion along the following lines:

[.....] Liberal Democrats agree that:

- a) No resources of the local party shall be used to promote the election of any candidates at the [.....] elections, except where authorised by and done through [name of agent].*
- b) A sum of up to £[.....] shall be made available from local party funds to [name of agent] for the purposes of meeting election expenses.*

Insurance

Arrangements for insurance vary around the country so check with your regional party in England / state party in Scotland and Wales as to what insurance they have put in place to cover, for example, any office equipment or public liability cover for events.

If the campaign takes on any extra property or equipment for the campaign, such as hiring a van to help put up posters, make sure you are clear about insurance arrangements in advance. Also, check the insurance policy details if any equipment is going to be moved to a new location.

3. Setting up bank accounts

Why you need a separate 'agent's account'

You must separate your personal finances, the constituency/local party finances and the campaign finances. You should, therefore, use a separate, dedicated 'agent's account' for paying any sums that will feature on election expense returns.

Do not use your own everyday personal bank account under any circumstances.

This is because:

- It is much easier to make a mistake if you have lots of different items going in and out of an account. If you have a dedicated agent's account, it is easy to check that all the incomings and outgoings feature on an expense return as needed.
- If there is any investigation into your activities as an agent, you cannot preserve your own personal privacy if your private financial affairs are mixed in with your agent activities.

Do not use a local party account. This is because income and expenditure received by the agent are covered by different rules and forms from those covering local party income and expenditure. So again, it is much easier to use separate bank accounts. Also, the agent has sole legal responsibility for election expenditure.

Do not try to get by without a bank account either. You will not be able to pay all bills in cash, and in fact using cash can look suspicious both in terms of tax (for suppliers you are paying) and in terms of trying to get around election rules. In fact, when Tower Hamlets Mayor Lutfur Rahman was taken to court in 2015 over his election, the absence of a bank account for this political party was raised in court at some length as being a potentially suspicious sign.

You can set up your agent's account in advance of an election. Indeed, many regular agents have an account which they use each time, and in between elections just leave a nominal sum, e.g. £1, in the account to keep it open.

All election bills must be paid from the agent's account. This gives you a clear record of all election payments. Any money left in it after all the election bills have been paid can be paid over to the local party.

Name of bank account

The Agent's Account should ideally be called 'Anytown Liberal Democrats' Election Account. This is because:

- Any appeals you send out raising money for this particular campaign should ask for cheques to be payable to this bank account. Members may rightly get rather suspicious if they were asked to write a cheque payable to just the name of the agent!
- This helps protect the agent and the local party from possible allegations of fraud or mismanagement.

However, sometimes agents find it difficult to set up such a bank account as the local bank or building societies want to treat it as a club or business account, demanding lots of paperwork or wanting to levy lots of bank charges.

In such cases, you may have to settle for a second personal account that is in the name of the agent, e.g. Albert Ingham (Number 2. account) and so must handle some donations differently (see below). In such cases, it is often easiest to get a second bank account by opening one online with one of the many institutions that offer accounts. Or ask your usual bank/building society if you can get a second personal bank account.

For both legal and practical reasons the only signatory on the account should be the agent. Expenditure is the agent's legal responsibility – so the agent must have the final control over it.

This is not a local party account. It is therefore not included in the local party's annual financial accounts.

The local party campaign account

The local party should have an account which acts as a feeder account for agents' accounts, such as when money is being split between several agents and campaigns. This account should be called 'Anytown Liberal Democrats' Campaign Account'.

The campaign account receives monies from the local party, branches, etc. which is given to help fight election campaigns in general. The funds are then parcelled out to the agent's accounts as needed.

Be very careful not to try to change the signatories on this campaign account close to a general election. These accounts are notoriously

difficult to administer and it can take forever to change the necessary signatures.

The reasons for having a campaign account are:

- It allows donations which are for election campaigns in general, rather than specifically for one candidate, to be paid into a clearly earmarked account. Members and supporters will often respond more positively to this. It also stops a difficult treasurer claiming at the last moment that they have no money to give to the agent!
- Putting campaign money into a separate account helps stop it being syphoned away for other activities.
- It separates out general donations from those specific donations to a particular campaign (which go into an agent's account). This is useful as the declaration thresholds covering these two types of donations are different.

The signatories on this account should be the agent, and two local party officers (with two out of three to sign any cheques). As this is a local party account it is included in its annual financial accounts.

Before the campaign begins, you can use the money from the campaign account for pre- election costs. After the campaign begins you can continue to pay routine, non-election bills for the constituency from the normal local party account.

You must never allow the campaign account to pay bills which must appear in an election expense return.

The usual rules for recording donations to the local party apply to donations to campaign accounts. It is the responsibility of the local party treasurer to ensure that all the usual checks on the permissibility of donations and declarations of donations are made when it comes to the campaign account.

Managing donations to the campaign

Donations to a particular candidate's campaign must be declared in their election expense return (and not by the local party treasurer in their monthly donation returns). They count as donations to that candidate rather than donations to the local party.

Therefore, money which is donated to a specific candidate's campaign goes directly into that agent's account. Money which is donated more generally, e.g. for the local elections that year, for which there are several agents, goes into the campaign account and is then paid across to one or more agents' accounts as appropriate.

All money donated to a specific campaign should be paid into that agent's account. That means every last penny, from the cheques given by the large donors to pennies thrown into the bucket at a public meeting or on a street stall. Money from the local party to help pay for election costs also goes into the agent's account.

If the account is in the name of the agent

If you have difficulties with setting up an agent's account and so have one that is in a personal name (see above), you may wish to handle the paying-in of donations slightly differently.

Because the account is in the agent's own name, it is not a good idea to ask people to make cheques for that specific candidate's campaign, payable to the name of the account. Making a cheque payable to a named person may seem odd to the donor and also makes fraud easier.

Instead, you should have the cheque payable to the local party and paid into its campaign account. It can then be paid across to the agent's account.

However, the local party bank account is only being used to pass on the money in this case. It doesn't count as part of the local party's income and expenditure and, even if of a declarable value, it doesn't feature in the local party's donations returns. Any donation declarations are made by the agent in their expense return.

If this situation arises, there should be a note to the local party's annual financial accounts explaining that some money passed through its bank account in this way.

Permissible donations

Donations of more than £50 made to the campaign must be from one of the following permissible sources:

- A named individual on the electoral register anywhere in the UK.
- A UK or EU company doing business in the UK.
- A registered political party or trade union.

- Building society, limited liability partnership doing business in the UK or friendly society.
- Unincorporated associations of two or more people mainly doing business in the UK.

Anonymous donations over these limits must not be accepted. Donations which don't meet these rules must be returned within 30 days. Such impermissible donations need to be recorded and declared either in the election expense return.

4. Planning your campaign

In the next couple of chapters, we will talk specifically about putting a campaign team together and what jobs need doing as part of that. But first, it is worth going through some general approaches to sensible planning.

Before you can plan your campaign, you need to look at the resources available to you. Broadly speaking these will fall into four categories:

- People (e.g. how many canvassers are there?).
- Time (e.g. how long does it take to get a leaflet out across a target ward?).
- Money (e.g. how much money is there in the bank?).
- Materials (e.g. how many stakeboards does the local party have?).

Sit down the candidate and a handful of key local party activists to brainstorm lists of what resources you will have under each heading.

Resources checklist

This following checklist will help you assess what resources you will have available and hence what level of campaign you can run and what targets are sensible to set.

Depending on the strength of the party in your area, much of this checklist may not be relevant to your plans. However please read through it anyway. There just might be something extra you realise you could do as a result of reading it!

Do not worry if any of these questions are new to you. Many of them we return to in more detail elsewhere in the manual, such as handling election expenses.

Delivering and canvassing

- Which wards/branches will be self-supporting in terms of delivery and canvassing?
- Which wards/branches are derelict (have no organisation at all)?
- How many deliverers do we have today?
- How many of these deliverers will help in wards other than their own?
- How many canvassers do we have?
- How many of them would canvass outside their own ward?

- How many of the canvassers also have to help deliver their wards?

Time

- Can I get the main election leaflets drafted and/or artworked before the formal campaign starts?
- Can I get the posters artworked before the formal campaign starts?
- How quickly can each ward be delivered with the current level of help?
- Is it possible for us to deliver the whole constituency inside one week?
- How long would it take to deliver one leaflet across the entire constituency?
- With the number of canvassers I have, what percentage of the constituency/target wards can we canvass during the campaign?
- How much time will I be able to give to the campaign? And how much time will the candidate be able to give?
- Do I have enough skilled activists to cover the tasks that need doing? Can any of them double up on more than one task?
- Do I need to beg/borrow help from other constituencies to cover any shortage of skills, e.g. a good artwork person? If so, what skills do I need to get covered?
- If full or part time employed, can I get the last week of the campaign off work, or just polling day? What about the candidate?

Money

- How much money, in total, does the constituency have in the bank?
- How much money will the executive agree to give towards the campaign? If they have agreed the sum already is it recorded in writing (e.g. minutes of the meeting or a letter from the local party treasurer)?
- Do you know how much money each of the branches has in hand? Of this, how much will each branch give to the campaign?
- Do you have enough money identified and available for the £500 deposit? Do we have any wealthy members who might lend us the deposit?
- Is there any danger we may lose our deposit?
- Do we have any wealthy members who might give us interest-free loans?
- How much money was raised at the adoption meeting last time?
- What is the legal limit on expenditure for our constituency in the election?
- According to our budget, how much money do we need to raise between now and polling day?

Materials

- Do we already have an HQ?
- Do we have a venue identified for use as a Campaign HQ?
- Can we afford to hire an HQ or will a member offer a venue?
- How many full-time helpers will we have for the HQ team?
- How many clerical helpers do we have?
- Do we have a large map of the constituency to put on the wall?
- Do we have smaller maps to print off for delivery routes?
- What office equipment do we have access to (useful even if there is no Campaign HQ)?
 - Computer
 - Laser printer
 - WiFi and broadband
 - Telephone landline
 - Scanner
 - Paper guillotine
 - RISO
 - Stuffing machine
 - Digital camera
 - Furniture
 - Rubber bands
 - Post-it notes in assorted colours
 - Bulldog clips
 - Double sided sticky tape for window posters
 - Stocks of envelopes, paper, toner and ink
- How many rosettes do we have?
- How many clipboards do we have?

Data and digital

- Is the constituency already on Connect?
- How many people know how to use it, and to what level?
- Is the electoral register up to date in it?
- Where are member and helper records stored – in MyCampaign or elsewhere?
- Where are local email lists stored?
- Who has access to update the website and social media channels?

Poster operation

- How many ready-made stakeboards and posterboards do we have?
- How many do we need?
- Where are they stored?

- How much spare wood do we have in stock for making up new and replacement stakeboards (garden posters on sticks)?
- Do we have a large shed or garage for sticking posters on wood and nailing onto stakes?
- Do we have access to a van or estate car for transporting the poster team or do we need to hire one and if so, for how long?
- Do we have anyone with experience of knocking on doors along main roads to ask people to have a stakeboard in their garden?
- How many generic window posters do we have left from previous elections?

Get SMART

Now you know what your resources are, you can start to plan your campaign. You need to be certain of what your three main objectives are.

These objectives need to be SMART. This means they should be:

- **Specific** – giving sufficient clear details of what you intend to do.
- **Measurable** – giving a numerical measure of what success looks like.
- **Achievable** – describes actions which you can expect to complete.
- **Relevant** – actions which contribute directly to achieving your overall aim.
- **Time-limited** and **trackable** – has an identified end point in time (deadline) and has identified milestones at regular intervals so that you can measure progress.

For example, an objective which says 'We will massively improve our membership' is not SMART.

Similarly, the objective to 'win this election' is not SMART if you are looking at a twenty thousand opposition majority and you have fewer than 50 members and no local councillors.

Alternatively, a SMART objective might say 'We aim to increase our membership by 3 members in each of our 4 target wards each week of the campaign, by calling on previously identified supporters.' This will mean an overall increase of 36 members over the period of a three-week campaign and therefore, this is:

- **Specific** as it identifies where the new members are to be found and how they are to be approached.
- **Measurable** as it identifies the total increase being aimed for.

- **Achievable** as it is only 3 new members each week in each of the four target wards.
- **Relevant** as activists can relate to the small numbers needed for each ward and that the new membership will help them locally.
- **Trackable** because each ward can see if they are on pace at the end of each week and **time-limited** as they know the objective must be delivered by polling day.

A set of genuinely SMART objectives will leave your constituency stronger at the end of the campaign than at the start.

Make targets for the right things

Having a candidate on the ballot paper and keeping both them and yourself out of jail is certainly target number one! But to get the most for the party – and out of your own time and efforts – you need to set sensible targets beyond this.

The biggest mistake people make is to think that it's only about how many votes the candidate gets. That is important, but it isn't the only outcome of an election, so here are other areas you should cover when coming up with the SMART objectives:

1. **Help get a Liberal Democrat MP elected:** this is the most important target. If it isn't a target that can be realised in your constituency this time round, then you can still make it happen – by making sure you and your team help out in a nearby Parliamentary target seat (sometimes also called a key seat or strategic seat). Visiting in person and doing phone calls can both make a difference between us winning or losing that target seat – so whatever the situation in your own location, you can help elect a Lib Dem MP.
2. **Elect more councillors locally:** make sure our Parliamentary campaign concentrates on areas and tasks which will best help our local target council ward(s) in future council elections.
3. **Recruit more members and helpers:** the best legacy a campaign can leave is winning the seat; the second best is to leave a bigger and better organisation behind that can do even better next time. If you are not in with a shout of winning, an extra 50 members are worth far more to the party than an extra 200 votes. Plan activities accordingly and concentrate on what will bring long-term benefits.
4. **Win more votes:** yes, this does matter (!), but the reason for putting it fourth rather than first is that too often in the past people

have concentrated on this alone rather than also thinking about the other four.

For each of these five areas (and others that are relevant to your own local circumstances), make sure you come up with at least one SMART objective.

Make sure you involve the candidate and key local party activists in this exercise so that there is widespread support for, and commitment to, the objectives.

Then, whenever planning activity ask, 'how does this help achieve our objectives?' The candidate spending 4 hours delivering a leaflet in a black hole may feel like worthy activity, but would your targets really have been better achieved by them spending 2 hours calling on local lapsed members followed by 2 hours telephoning voters in a Lib Dem MP's constituency?

During the campaign, keep on checking up on the SMART status of your campaign plan – it is amazing how easy it is to drift away from the planned key objectives during the campaign itself. Therefore you should take a minute or two at every team meeting from now till polling day to consider how you are doing against your planned objectives for the campaign.

If you realise that the campaign is straying off course then read through the resources checklist again. This will help you decide if you have the resources to achieve your objectives as they stand.

Planning to win votes

One key part of your plan will be about winning more votes. This breaks down into four areas:

- Setting your message
- Persuading people to vote for the Liberal Democrats
- Identifying voter intentions
- Getting the vote out (GOTV)

Setting your message

The most successful messages combine what people will be hearing about the party through the national media with what is specific to your area.

Remember that your voters will be hearing, seeing or reading about the party through the national or regional media, so your local campaigning works best when it runs in tune with that, rather than confuses voters and makes them distrust us by saying something contradictory.

Messages also need to persuade people. Telling them they are stupid or that they got something wrong does not make for a successful message! The idea is to get people to change their minds, not to feel good for browbeating them. Often the best way to persuade people to change their view is to emphasise new information which they did not realise before – new information makes it natural to come to a new decision.

Agree a simple clear set of messages – no more than five. Start early and repeat them at every opportunity and through every communications channel.

Persuading

Persuading people to vote for us is done by a combination of literature and canvassing. Those two techniques each have their own benefits, and the best campaigns balance the two to make an effective combination.

Leaflet delivery is very quick compared to canvassing, communicating messages to large numbers of voters relatively swiftly and setting the background tone against which canvassing takes place.

Canvassing conversations (on the door or the phone) are important to back up the literature and persuade people to vote for us. They are great both to gather data to fuel our campaigns and also to 'seal the deal' when someone has been warmed up by literature but hasn't yet made a firm decision.

Just by turning up on someone's doorstep, a canvasser makes that person much more likely to vote for us. A short, positive conversation and then handing over a calling leaflet increases the likelihood of winning that vote even more. Staying for a long policy chat or trying too hard to convert a voter often undermines that initial positive impact.

Even so, canvassing is much slower than delivering leaflets – and so if you are short of help, concentrating on leaflets should be the priority, mixed with selected canvassing by the candidate's team to get their profile raised.

Only the target seats will be able to get enough literature delivered to allow them to divert large amounts of help to canvassing. That is why they need help from non-target seats to run a full scale winning campaign with lots of leaflets and plenty of door knocking.

Literature primarily consists of one or more deliveries of leaflets, newspapers and target letters, along with the Royal Mail Freepost.

The Royal Mail Freepost Election Address is a free delivery of one item of literature that the Royal Mail will do to every voter for each candidate. We have to pay for the leaflets/letters, but the delivery of them is free.

This is such an important piece of literature, it has a chapter to itself – chapter 15.

Websites, tweets, Facebook updates, emails, text messages and similar are increasingly important to reinforce your campaign message. In particular, they will help you reach people who are hard to contact through traditional campaigning, such as students in halls of residence. They can also be a very cost-effective way to campaign.

Information in the press and media may also help persuade voters our way.

You need to decide how you intend to run the literature and press aspects of the campaign, bearing in mind the results of your resources checklist.

Make sure your message is consistent across all the different communications channels you are using. Suppose your candidate is collecting signatures for a petition on saving a local doctor's surgery in the town centre. She should be tweeting about it, with a link to the petition on campaign website as she is walking around the town. The same petition link should be on Facebook and featured in any leaflets being delivered that week. As you can imagine, achieving this level of integration needs a fair bit of planning.

Identifying

Identifying the people who vote for us can be done by canvassing, telephoning or surveying. Increasingly online surveys and petitions are a rich source of identification data too, as is the historic data the party has

collected in the area through previous elections and stored in our electoral campaign database, Connect.

Getting out the vote

Getting the vote out (GOTV) is done by an effective Polling Day organisation including leaflet delivery, knocking on doors and making phone calls. Emails and text messages, along with social media update, also play a useful supporting role.

Running a special operation earlier in the campaign to knock up postal voters is worthwhile if you have the resources as they get their ballot papers in advance of polling day.

Preparing to write your campaign plan

Here is a checklist of common questions you might like to consider when writing your campaign plan. Bear in mind that this list is a prompt to get you thinking – there are lots of other questions you might want to ask yourself.

- What are the three main points that we will focus on to persuade people to vote for our candidate? (Your campaign message)
- Are you going to do more than the basic unaddressed Freepost? If yes then what variation do you want to do and do you have the clerical help and other resources for the task?
- How many times do you want to deliver other leaflets across the whole constituency?
- How many local council wards will have an election on general election polling day and how many are marginal or target wards?
- Are you going to deliver extra leaflets in our target local election wards?
- Do you need a calling leaflet for canvassing?
- Do you need a residents' survey leaflet?
- What target letters are you going to deliver?
- Which target seat are you going to help? How many of your helpers will be willing to do this?
- What activity will you organise for polling day, using people who are not prepared to travel to help win a target seat?
- How many good-quality news releases do you intend to put out during the campaign?
- What photo opportunities will you be able to stage for the press?
- How many emails will you send?
- How often will you update any websites/blogs?
- What text messages will you send?

- Will you make use of sites such as Facebook and Twitter?
- What budget will you commit to Facebook ads or boosting posts on the site?

Writing your campaign plan

It is vitally important to have a written campaign plan. Verbal plans can lead to misunderstandings and problems. Once the plan is written down it needs to be circulated to the members of the core team.

Both the number of helpers and the amount of money you have are important factors to consider at all stages of writing the plan.

Consider the questions above and draw up a rough literature and press plan for the campaign. Work out the additional time needed for the artworking and printing of each item of literature.

Begin by creating a planning grid or wall planner, to place on the HQ wall. Have enough space right up to and including Polling Day itself and a week beyond. This chart can be a rough drawing on a whiteboard or a large sheet of plain paper such as flip chart paper.

Alternatively, create something a bit more complex on the computer – some people like using a simple Excel spreadsheet or filling in a computerised diary. You can also use something a bit more sophisticated such as the free packages discussed at <http://blog.captterra.com/free-open-source-project-management-software/>.

Even if you use your computer to create your planning grid, we strongly suggest you have a wall planner too!

It is a better prompt for action than looking on a crowded computer screen and you should start with the wall planner for working out the dates as this makes it much easier for a group of you to work collectively and see how the dates fit together.

Many agents and candidates and activists find it useful to have a wall planner at home, marked up with the main campaign deadlines.

Begin by writing in deadlines on the chart, using the election timetable as a starting point for key dates such as the deadline for submitting nomination papers. An important date you will need to find out is the last

day for handing over the Freepost to the Royal Mail. Action Days for the target seat you are supporting should also be written up on the chart.

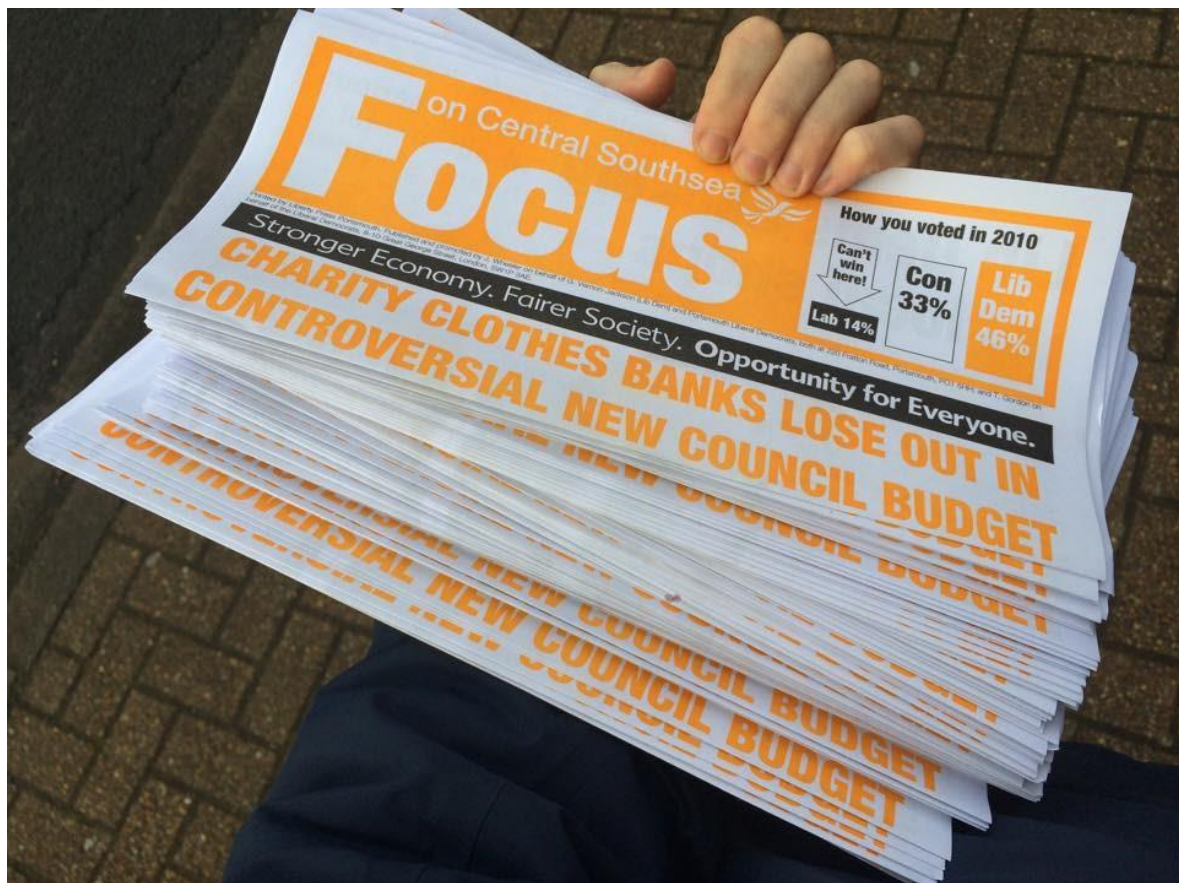
Now take each of your campaign tasks in turn and write out a series of post-it notes for each step involved – and place them on the wallchart showing the timings you will need for each step.

Write on each post-it note who will be responsible for each step too. (You should read the following chapters on the team and job descriptions before doing this.)

You will then start to see your campaign plan come together on the wall in front of you.

Get different people to check each other's list of steps to make sure you have not missed out something critical.

Example: planning for a FOCUS delivery



Here is an example of breaking down a task into a series of steps to give you an idea of how the process works:

Campaign task: design, print and deliver a local FOCUS leaflet in 2 target wards

- Appoint artworker*
- Confirm how many leaflets needed for the two wards
- Identify the deliverers if no delivery network in place
- Find printer prepared to print leaflet
- Get a quote from the printer for different options such as size (A4 or A3) and full colour or black and white
- Agree on finished format for the leaflet with the artworker
- Make a booking, confirm quote in writing and agree on deadline with the printer
- Agree on the format for giving the finished artwork to the printer
- Ask local activists for stories
- Gather appropriate photos to illustrate stories
- Create the artwork
- Send the artwork to the printer
- Check the proofs with the printer and give the go-ahead to print
- Collect the printed leaflets
- Fold and count the leaflets into bundles
- Distribute the leaflets to the deliverers
- Deliverers put leaflets through doors
- Pay the printer's invoice*

* These two steps will come up under multiple tasks and so when you put the plan together may not need identifying separately for each one.

Refining your plan

Once you have got lots of detail on your chart take a step back and consider if there are days when lots of deadlines occur at the same time, such as:

- Does an important leaflet have to go to print on the same day that the nomination papers have to be submitted?
- Are there clashing demands on one person's time on a particular day?

Consider when you are likely to have the most help from activists. In most constituencies, more people are likely to be available to help on the weekends. However, if most of your activists are retired people, the reverse may be true. So if a big clerical or delivery effort is needed think about this point

The more you can plan and prepare in advance, the less likely it is that mistakes will occur in the heat of the campaign.

Be ready to adapt your campaign plan if circumstances or resources change. For example:

- If you have more money donated than you budgeted for then consider taking out extra paid advertorials in the local paper or ads on Facebook.
- If you have less money donated than you expected to have, cut a leaflet A4 to A5 or pull back from full colour to black and white.

Writing your campaign budget

Having a written budget is really important for your campaign – to ensure you keep within the limits and also within your resources to pay the bills.

Start working out a rough budget once you have decided how many leaflets you would like to do and how much money you are likely to have.

As printing will be the bulk of your budget, you will have a pretty good idea if you are in the right general area. Now you can start to look at other campaign costs. Write down absolutely everything you can think of that might cost you money during the campaign – and work out how much it will all cost! Make sure there is no chance of overspending.

Check your budget total against your election limit.

See if you can get a copy of the budget for the last general election – that can be a good guide. If not, a budget for the last local elections is also often useful, though remember that they have very different expense limits.

Make sure you consider more than one quote for any large scale expense – and get those quotes in writing if you are going to rely on them. Be suspicious of very low quotes. They may be great and work out fine – but they may not. So find out just how that low price is possible.

Items given for free or at more than 10% discount must be included in your expense returns at their market value. Using them doesn't eat into your cash, but does eat into your expense limit.

Look out for hidden costs. Be particularly careful not to assume that a member or supporter who offers to help in their work capacity will give you the best available deal. They may end up charging you the going rate for the job or product when you were relying on them giving you a good discount. Sticking to the policy of getting quotes from the available competition is a good safeguard against many of these problems.

Ask yourself if you need to hire an HQ. Most candidates will want one. If you have a small campaign team an HQ may be counter-productive. It ties up team members who might be better off out on the doorsteps. You may find it easier to work from your own home, turning one room into an office for the duration of the campaign. If that is not practical, you may find a local member or supporter who may agree to have one of their rooms used as an HQ.

Headquarters may cost you more than you expect. Use of phones and office equipment add up in an alarming manner in just a few weeks. Do not forget electricity, water bills and business rates if you hire an HQ. All of this has to be paid for and also needs to feature appropriately in your election expenses return.

Photography costs are rarely an issue in campaigns now thanks to digital cameras but do not overlook costs such as the occasional emergency use of a traditional film camera or possibly buying the rights to use a particularly good photograph on a website.

Once you have written your budget, stick to it.

Make it clear to the candidate and everyone else on the team that no-one else can go and spend any money **at all** without your written permission.

There will always be extra costs you did not expect. This is not a problem if you have included a sensible sum for contingencies in your budget.

You may well be pressured to produce extra leaflets in the last week of the campaign. Only do so if you have a genuine chance of winning! Do not let your team's enthusiasm lead you into spending money that you do not have.

Make sure your budget is up-to-date. Prices go up all the time. Check up and get fresh quotes as the campaign begins.

Last but not least: when writing a budget do not use unrealistically low costings to show how clever you are at saving money. If you submit the lowest possible costs and then overspend you will not be popular. You may even end up having to dig into your own pocket to cover the extra expense.

If you have combined general and local elections on the same day, you should have a combined budget covering all the elections. This both makes campaigning sense (our activities need to be coordinated to get the best results) and also is the easiest administrative approach (as many items will be split between the different campaigns).

Once you have your budget in whatever format you find easiest to use (e.g. in Excel), then make sure you add in the real costs next to your estimates during the campaign so you can keep track of how reality is panning out compared to the plan – and make sure you are in no danger of breaking the legal expenses limit.

Campaign budget checklist

- HQ rent
- Electricity
- Rates etc.
- Installation of phone lines
- Rental and charges on phones
- Electricity
- Photocopies
- Hire of equipment (computers, RISO, internet connection etc.)
- Photographs (not digital)
- Election supplies (rosettes, tellers pads, etc.)
- General stationary (labels, sellotape, staples, etc.)
- Postage
- Election Addresses
- Leaflets for delivery
- Calling leaflets
- Tabloid newspaper
- Miscellaneous flyers
- Target letters
- Polling day literature
- Window posters
- Stakeboard posters
- Wood and other equipment for stakeboards
- Other items
- Contingency

VAT

Leaflets are zero rated for VAT unless more than 25% of the leaflet is for writing on and returning, such as a petition or survey, in which case the standard VAT rate applies. Posters also attract the standard VAT rate.

So be aware of this in your budgeting if you are including a survey of some kind in your campaign or like using large grumble sheets in your leaflets.

Keep return slips and surveys to less than 25% of a leaflet to avoid a VAT charge.

Printers sometimes wrongly think they need to charge VAT when they do not, such as when they are used to thinking that 'postcards' attract VAT and so want to charge it for a small leaflet of ours. However true postcards only attract VAT not because they are small but because they are for writing on and sending. VAT notices 700/24 and 700/10 are the ones to refer the printer to.

Of course, this is all academic if your printer is so small that his/her business is not VAT registered.

You may be asked about VAT when placing online adverts with social networks. You should pick the option which means that you will be charged VAT. This is because we are not registered for VAT for campaign purposes. For example, on Twitter this means selecting the 'personal' rather than 'business' option.

5. Motivating your team and supporting target seats

If your own constituency isn't winnable this time round, helping a nearby target seat win is a critical part of the campaign plan – as that's the element that will mean after polling day you can look back and know that you helped get a Liberal Democrat MP elected.

In addition, there are real positive spin-offs for your team from getting involved with a target seat campaign. These include:

- Learning the latest campaigning skills from the party's biggest campaigns.
- A feeling of being part of the larger commitment to the success of the party.
- A great introduction for new activists who get the fun of taking part in a large campaign which has many supporters.
- Activists from the target seat will be willing to come and help you when you have elections.

Supporting target seats is one of the most important tasks facing the agent. You have to balance off the need to keep up morale and the will to work hard locally with the need to make sure we win as many seats nationally as possible.

Team morale

During the course of a campaign, a feeling of momentum often develops which convinces activists and the candidate that they are going to win. This is often based on nothing more concrete than people making friendly comments on the doorstep. The net result is that the team will resist sending help to anyone else on the grounds that it might stop them winning themselves.

You, the agent, must resist being swept away by this entirely understandable euphoria.

You have to keep your feet firmly on the ground, especially as your candidate may be particularly affected by the belief that the impossible will happen and that a fairy tale ending is in prospect. You must be sensitive to this, especially on polling day. It is cruel to allow a candidate to go to the election count thinking they have won when they have not.

If your seat is a target seat

If this is the case your responsibility is to make sure that people who come in to help are used effectively, kept informed and are thanked for their efforts. Then the help will continue to come!

In particular, take care to listen to what people coming to help might want to learn – and try to give them roles that will train them up in those skills. If someone, say, is keen to learn more about Connect then don't just given them a bundle of leaflets to deliver each time.

6. The campaign team

Your working relationship with the candidate is vital to the success of the campaign.

It is important to be aware that there are certain tensions built into the situation. As an agent, you are in charge of the campaign team. However, the perception from outside, and of party members and helpers on the ground, is that the candidate is the leader of the campaign. In addition, the candidate may feel frustrated and unsettled by feeling that they are not in control of the campaign. They may feel that if it all goes wrong, they will end up as a public laughing stock.

You must be aware of these tensions and be sensitive to them. It is your job to smooth things down if problems occur.

Problems between the agent and candidate are not inevitable – many campaigns go by without a cross word between them. With a little luck, lots of good communication and good judgement, your campaign will be one of them.

You need to have a clear idea of the candidate's strengths and weaknesses and play to them in the way you organise their election programme. Are they best in the morning or evening? Do they have a low point in the day? If you know the candidate is usually flagging badly at 6pm, then it is not a good time for a core team meeting about a sensitive campaign problem!

Naturally, you will have disagreements with the candidate. Very occasionally you may have to overrule them. However, it would be better to avoid that kind of confrontation if you can. Remember that however annoying you may find the candidate at times:

- Never argue with the candidate in front of anyone else.
- Never run the Candidate down to another team member.
- Never score points off the Candidate in team meetings.

If you do any of the above, you will damage the motivation of the team. Most of them are motivated by the goal of helping the candidate. If the candidate gets you down, telephone another agent in a different seat to talk it over. They will understand and may be able to suggest a solution.

(We are usually great advocates of looking for advice and support from one of the excellent Facebook groups run by different parts of the party. However, for help on relations with a candidate remember to be a bit more discreet – frank advice is best asked for and provided when you don't have to worry about the candidate, their family or friends seeing every single word of the exchange.)

It may help to remember that the candidate probably feels just the same way about you as you do about them!

But if your relationship with the candidate deteriorates to the point where it is undermining the campaign, contact your region/state party.

It is very useful to have a telephone tree set up before a campaign begins. Even for a small campaign team, it is amazing how long it can take to call six people – calling two who call the others is a big time-saving. Make sure the key contacts in the phone tree structure understand their role. If they cannot get through to one key person they may want to bypass them to push the cascade on down the line. This is particularly important in a large constituency.

The campaign manager

Some constituencies traditionally have a campaign manager to run the campaign. The division of tasks between the campaign manager and agent varies considerably. The following points are vital:

- The agent is still legally in charge and makes all the final decisions.
- The division of tasks between agent and campaign manager is very clearly laid down, preferably in writing, and understood by the rest of the team.
- The agent is still responsible for the money.
- The agent must check all literature before it is printed, even if literature writing and production is run by the Campaign Manager.

Structure of the campaign team

The structure of your campaign team will be heavily influenced by the number of volunteers you have available to you. If you have a very small team – less than five people – you will run a small and tightly planned campaign. If you have more volunteers available, you can be more ambitious.

If you have had time during the run-up to the election, you will have spotted people from amongst the activists to take on key roles in your

team. If you were appointed with just days to go, you must do the job as you go along.

The main choice over team structure is whether to organise on a function basis, allocating people to specific tasks to be handled centrally, or organise on a geographical (e.g. ward) basis, devolving some tasks down to different ward or area organisers. The decision you make will be influenced by both the physical make-up of the constituency, the number people you have available, and their skills. Naturally, you will want to consider the current organisational structure of the constituency.

Whatever you decide, it is a very good idea to draw up an organisation chart and email it round so everyone is clear on who does what. If you have an office, also put it up on the wall where everyone can see it. Include people's email and phone numbers for easy reference too.

It is worth noting that many of the similarly named peacetime jobs are somewhat different during the campaign proper. For example, a delivery coordinator has much more to do during the election proper and needs more time available to do the task effectively. This may mean that a different person will be needed for the task at election time.

The core team

Your whole team could consist of anywhere between 3 and 30 people, depending on your constituency strength and membership. If you have a large team, you will need to have a smaller core team, responsible for helping you create the campaign plan and then making it happen.

This team consists of yourself, the candidate and no more than three key activists in a small team and five key activists in a large team. They should be the people you can rely on – the people who will help develop the strategy and then make things happen.

No one gets to be part of this team purely by virtue of rank.

For example, if the core team includes the local party chair, it is because you think they have a valuable contribution to make to the campaign, not simply because they hold that post. The same applies to people holding other posts in the local party or council group too.

Weekly core team meetings

Members of the core team should meet for a planning meeting early every week, ideally on a Monday. This meeting checks actions against the

campaign plan, sets short term objectives for the week and manages any unexpected problems.

Daily core team meetings

Members of the core team should meet daily. Normally we recommend first thing in the morning or last thing at night. The meeting on a normal campaign day should not need to take much more than 20 minutes. This meeting should review the events of the previous 24 hours and assess plans for the next day or two, especially your social media and press operation. This is an operational meeting, not an overall strategy meeting.

You might report on matters such as:

- Which wards finished delivery of leaflet X today?
- Where will we be canvassing over the next two days?
- When is our next visit to the nearest target seat?
- Is the candidate's diary for tomorrow ok?
- Has anything come up nationally that we need to react to – or gives us an opportunity?

A daily quick meeting is also a good way of making sure that any issues are brought up quickly rather than fester.

You need to have a good chair for the meeting so that it remains a *short* daily catch-up and doesn't become a long meandering discussion that eats into eating and sleeping time.

Do not allow problem-solving to hijack this meeting. If problems are identified in the meeting, the agent decides who they want to manage the issue. That person then goes away after the meeting to sort it out and reports back to the agent or to the next day's meeting.

Some candidates like to come to daily core team meetings. Others value having a little more time to themselves.

Weekly meetings for the whole team

Have a regular meeting, chaired by you the agent, once a week during the campaign for all team members and helpers. This is best held on Sunday or Monday night. Your members and other helpers can attend if they wish and be given an update on what has happened so far and the plans for the coming week. The candidate must also attend.

You can use the occasion to thank people who have made an effort above and beyond the call of duty. The candidate should thank everyone for their efforts so far and send everyone away enthused for the next week of the campaign.

These meetings are vital for keeping the team motivated. Otherwise, it is so easy for individuals to drift away from the team and not feel involved or appreciated.

Again, it is importance to give attention to chairing the meeting well. You need to give members and helpers the opportunity to raise issues, but likewise, remember the repetitive person who every time wants to spend 30 minutes reminding everyone of everything that is wrong in the world will be very off-putting to new (and not so new!) helpers.

***Thank everyone for their help every time they do anything –
no matter how unimportant a job it was or how little time it
took.***

Campaign tasks

Here is a list of the main tasks that need to be done by the campaign team in a fairly large campaign. Each task must be allocated to a specific team member. They must know they have responsibility for making sure the task is carried out within the time available.

The biggest target seat campaigns will have extra tasks – they will be doing all the tasks listed below and more. If you have only a few team members to help you, then be selective about what tasks matter.

- Literature preparation and artwork
- Literature printing and logistics
- Royal Mail Freepost organisation
- Poster Campaign management
- HQ Management
- Volunteer organisation
- Front of House - welcoming
- Clerical help organisation
- Canvassing management
- Virtual Phone Bank (telephone canvassing) organisation
- Connect manager (computer data and analysis)
- Postal vote campaign
- Meetings and special events organisation
- Candidate's diary

- Candidate's driver
- Candidate's aide
- Casework responses
- Press and media campaign
- Social media campaign
- Website operation
- SMS campaigning
- Appeals and fundraising
- Polling day organisation including arrangements for the count

In a large team, more than one person will work on each task. In a small team, one person will do several of these tasks.

It is vital that one person is appointed to oversee each task and is responsible for leading and managing the team working on it.

Clearly, the people in charge of each of these different areas must communicate with each other on a regular basis. The agent must make sure this happens. Think of the agent as a spider sitting at the centre of a web, sensitive to the slightest movement – wherever it may happen, as soon as it happens.

Money management

You may have noticed that there is no-one on this list in charge of the finances. That is because this is a vital part of the job of the agent.

As the agent is in charge of campaign finances, the local party or branch treasurer can be in a slightly tricky position. They can, and should, be involved in the decision beforehand on how much money the local party can spend on the campaign. But once it has begun, their role is limited, as the agent must be the one who authorises expenditure and who pays bills, and it is the agent and candidate who must sign the legal paperwork after the campaign.

However, the treasurer should continue to maintain the local party's financial records, including those for the campaign account and declaring donations to the party (as opposed to the specific campaign) as necessary.

Deciding who does what in your campaign team

We suggest running a planning session to decide how to structure your team.

Get your core team together for a three-hour meeting – it may not take that long! Now get hold of a pad of flip chart paper and blue tack a sheet to the wall.

Take a selection of post-it notes or other sticky notes. Have a selection of dark coloured, fine point felt tip pens such as Sharpies available. The reason for using Sharpie type pens is that you can photograph the sheets once they are finished and the post-it notes will be readable – ballpoint pen does not photograph as well.

Write down the names of your core team members, each name on a single PIN. Use just one colour of post-it notes for these names.

Now take a pad of a different colour of post-it notes. Write out what tasks you think you want your campaign to carry out – one task to one post-it notes. These are the task post-it notes.

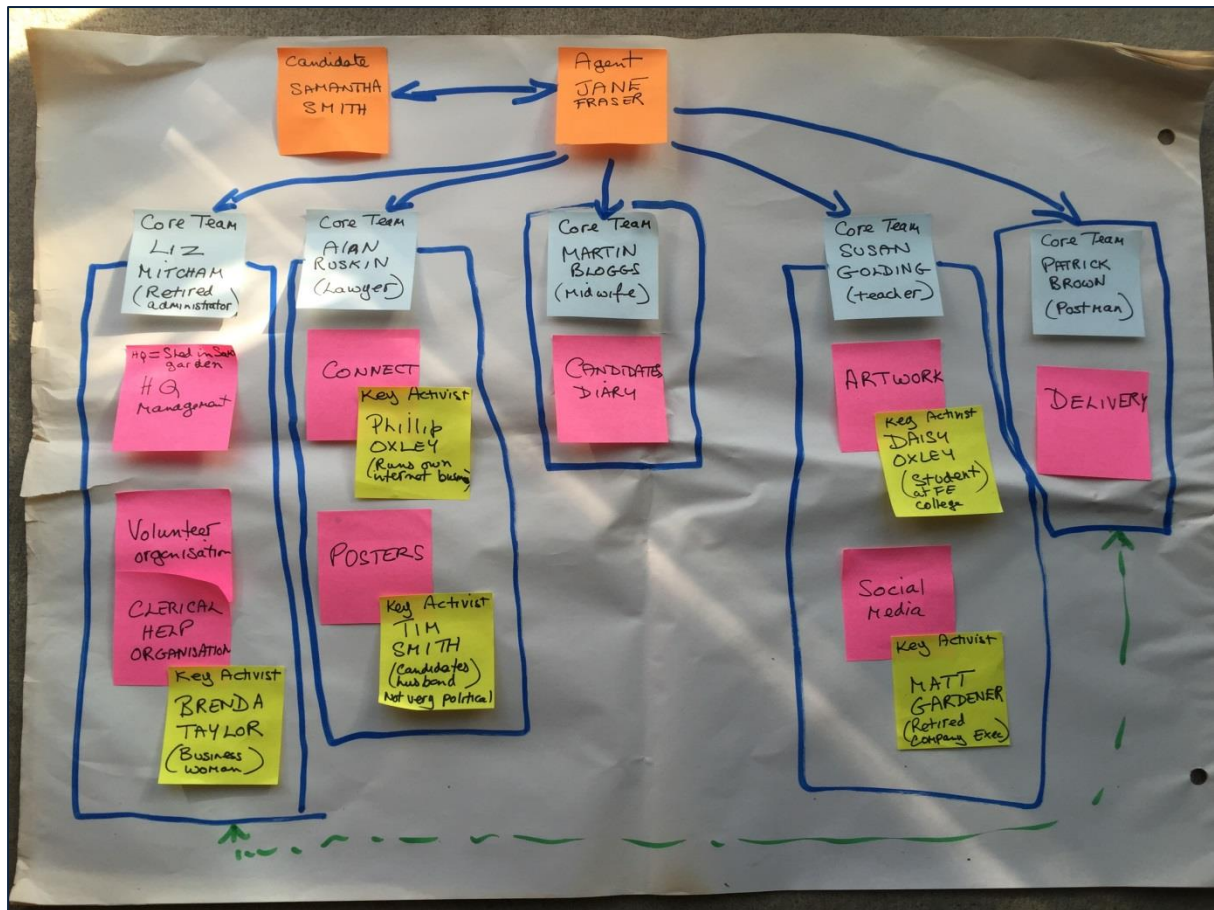
Take a third coloured pad of post-it notes. On these write the names of the people who might help with this task and a word two to say why.

Put the core team post-it notes in a row across the top of your flip chart sheet. Stick each task post-it note below the name of the core team person who you think might be responsible for the task.

Now put the names of the helpers below the relevant task post-it note. If there is a gap you may find it helps to put in a post-it note with a large question mark written on it.

Next, discuss whether you have the right combination of people and tasks. You may want more post-it notes around on the paper until you feel you have the right combination. Are there enough people or do you need to drop a task from the plan? How can you find someone with the right skills to join the team if there is a gap?

The photo below is for a team from a medium sized constituency with a membership of around 120 people. Our experience shows that the One in Ten Rule applies so a campaign team of 12 activists is a realistic option. But only if you ask them to help in plenty of time.



Try to set up reporting lines where people get on well with each other and have a task they enjoy or at least understand is essential.

If you look at the photo you will see that some tasks on the list above are not on the sheet such as, for example, replying to casework letters. In practice, the candidate will do that in smaller campaigns, and she might well ask a friend or member of the family to help her.

This example is for a seat which does not have local elections on GE Polling Day. If you do have local elections going on too, you may want to appoint one person to liaise with the local council candidates to make sure they feel properly included.

Constituency teams across the country will vary in size dramatically.

You may be looking at the lists and advice in this chapter in complete disbelief. You may think you have less than half a dozen other people available across the entire constituency to help you. Clearly, if this is the situation you are in, it is not realistic to plan to overturn a twenty

thousand majority or to come from a distant fourth place to win in one General Election campaign.

Instead, you should set yourself achievable targets, using the advice at the start of the manual on setting sensible targets.

They might be:

- Running a full set of candidates in the local elections.
- Visiting the nearest Liberal Democrat target seat once a week during the campaign and having one telephone canvass session for it a week.
- Recruiting one new party member for each day of the campaign.
- Getting 10 new email addresses for voters each week.
- Recruiting a delivery network to cover 50% of a local council ward we want to target in future years.

Don't worry: you can still run an effective campaign if you make sure your plans are in proportion to your resources. People who are not Party members will offer to help at general election time. As a result, you will be able to do far more than you ever dreamed possible.

The bare minimum

If there is just you and the candidate, then consider the bare minimum:

- Get the nominations in safely.
- Make sure all requests from the press, local websites and so on for information are answered.
- Make sure correct contact information and basic biographical information are on the main websites profiling candidates, especially www.LibDems.org.uk and WhoCanIVoteFor.co.uk.
- Reply to all incoming messages from voters (especially via email – expect there to be lots of these generated by campaign groups). Also, make sure that the data from these messages is added to Connect where possible (see the data protection chapter). If you are going to struggle to record all the data – which is hugely valuable for future contests, especially list PR ones – then talk to your region/state party about how they might be able to help.
- Have the candidate attend all the hustings they are invited to.

Also, make use of the Royal Mail Freepost service to get a leaflet printed and delivered to voters to the extent you have the capacity to do so.

No matter how small your team, your campaign can still be a success – providing you have agreed on an appropriate set of objectives.

No matter how much or how little you spend in an election campaign, the full election expense return forms will need filling in and submitting afterwards.

7. Campaign team: job descriptions

We have already looked at the tasks which need to be carried out by campaign teams of varying sizes, from small to large. In smaller teams, some people may double up in multiple roles and some tasks may not make it into your list of priorities to cover.

This section gives a set of outline job descriptions for each role, with the person holding that role reporting directly to the agent. In addition, they can (and should!) recruit other people to help them with their tasks, and it is their responsibility to coordinate the help of those assistants.

Literature officer

- Responsible for the design and artwork of all election leaflets and posters (leaflets cannot be written by a committee!). May either do the artwork themselves or delegate specific leaflets to other skilled designers.
- To save time and help with consistent messaging, should use templates from ALDC/the party where possible – and therefore should use PagePlus as this is the party's standard desktop publishing package.
- Responsible for checking all artwork with the agent (and the candidate if they wish to see it) before printing.
- Responsible for getting the artwork to the printer on time, with all the necessary detailed printing instructions, photographs, etc.
- Responsibility ends when leaflets have been printed and handed over by the printer to the campaign team.
- Responsible for sending a thank you note to the printer(s).

Delivery officer

- Responsible for setting up the delivery network and maintaining it during the campaign.
- Ensures distribution of bundled leaflets to the area coordinators or ward 'wholesalers' who then pass them on to the individual deliverers.
- Responsible for monitoring the effectiveness of the delivery network and providing help and reinforcement from 'floating' deliverers where needed.
- Responsible for ensuring deliverers feel informed and thanked, including having all their details recorded in Connect's MyCampaign.
- Responsibility ends when all the campaign's leaflets are delivered through doors – and all deliverers have been thanked and invited to the thank you party.

Poster officer

- Responsible for ensuring there are sufficient stocks of window posters and for distributing them to members and previous poster sites.
- Responsible for making up all stakeboards (posters for gardens/attaching to gutters), including having sufficient stocks of wood, posters and other necessary materials to last the campaign.
- Responsible for finding people who are prepared to go around and put up stakeboards at previously identified sites across the constituency.
- Responsible for following up on leads for possible new stakeboard sites and for ensuring canvassers, candidate etc. are recruiting extra sites during the campaign.
- Responsible for ensuring people who are letting us use them as poster sites feel informed and thanked, including having all their details recorded in Connect's MyCampaign.
- Responsibility ends when stakeboards are taken down after election – and all poster sites have been thanked and invited to the thank you party.

Volunteer team organiser

- Maintains lists of all the volunteers who help during the campaign, whether or not they are members.
- Coordinates approaches to potential helpers, including ring-rounds to get helpers to assist with specific tasks.
- Ensures any offers of help that come in via party HQ are followed up.
- Responds to the needs of other team leaders on the campaign by contacting the required helpers.
- Maintains and checks the helper sign in book in the HQ (if applicable). Adds names of people who help without coming into the campaign HQ.
- Responsible for asking helpers who are not members if they wish to join the party.
- Responsible for ensuring volunteers feel informed and thanked, including having all their contact details and how they are willing to help recorded in Connect's MyCampaign.
- Responsibility ends when all members and volunteers have been thanked, including an invitation to the thank you party.

HQ or front of house manager

Only required if the campaign has a designated office or shopfront either full time or on the weekends.

- Welcomes all volunteers who come to help the campaign. Looks after their general well-being and sends them out delivering/canvassing as soon as is humanly possible, as often as possible.
- Responsible for ensuring all volunteers who come to help are briefed and trained – even if they think they already know how to do everything under the sun.
- Responsible for running the office – making sure there is enough toner, paper, etc. available to keep the HQ ticking over.
- Responsible for handing out leaflet deliveries for the areas run by the HQ.
- Responsible for running the clerical operation – stuffing letters into envelopes, labelling letters, etc.
- Makes sure the phone is answered and messages are distributed efficiently. Ensures that all enquiries from members of the public are dealt with promptly, efficiently and courteously.
- Responsibility ends when the HQ has been cleared up after the election – with all useful information filed where it can be easily referred to in future, and all helpers have been invited to the thank you party.

Canvassing officer

- Responsible for planning which areas to canvass and when, in consultation with the agent.
- Responsible for selecting which groups of voters to call on within those areas (e.g. only regular voters), again in consultation with the agent.
- Responsible for ensuring those going out canvassing have the right step of equipment, including maps, rosettes, window posters, postal vote forms, casework forms, membership forms, feedback forms, calling leaflets and canvass cards/MiniVAN (for smartphone or tablet).
- Organises teams to go out canvassing with the candidate.
- Organises group canvassing visits to nearest target seat.
- Responsible for doorstep recruitment during the campaign.
- Responsible for training canvassers and getting their feedback.
- Responsible for all data gets acted on and entered after canvassing sessions, including canvass data going into Connect, poster sites to the poster team etc.

- Responsible for keeping an eye on the canvass results and, in a target seat campaign, tracking the voting trends.
- Responsible for ensuring volunteers feel informed and thanked, including having all their details recorded in Connect's MyCampaign.
- Responsibility ends when all data from canvassing is safely recorded and followed up, and all canvassers have been thanked and invited to the thank you party.

Virtual phone bank officer

- Responsible for organising telephone canvassing, using Connect's Virtual Phone Bank (VPB) feature.
- Works closely with the canvassing officer (and often reports to them).
- Responsible for planning which people to call, and what script to use, in consultation with the agent and canvassing officer.
- Responsible for training and getting feedback from those phoning.
- Responsible for ensuring that offers of help, postal vote requests, casework etc. from phone calls are passed on and followed up.
- Organises phoning for nearest target seat.
- Responsible for keeping an eye on the canvass results and, in a target seat campaign, tracking the voting trends.
- Responsible for ensuring volunteers feel informed and thanked, including having all their details recorded in Connect's MyCampaign.
- Responsibility ends when all data from canvassing is safely recorded and followed up, and all phone callers have been thanked and invited to the thank you party.

Postal and proxy votes organiser

- Responsible for collating all existing records of people who have had, or who might need postal or proxy votes, and contacting them in time to get them signed up for a postal or proxy vote in this election.
- Responsible for arranging postal or proxy votes upon request from a member of the public.
- Responsible for monitoring groups who might need absent votes unexpectedly, such as students away on polling day.
- Responsible for ensuring all volunteers involved in these tasks know about, understand and follow the Electoral Commission's code of conduct (a copy of which is in the appendices).
- Responsible for collating records in Connect of everyone who had an absent vote, and of those who apply too late to obtain one so they can have one next time.
- This job continues until after polling day when all the data is sorted.

Royal Mail Freepost organiser

- Responsible for liaising with Royal Mail about the Freepost, and getting their approval for the artwork before printing.
- Responsible for organising the clerical operation to do any bundling, sorting or labelling that needs to be done before the delivery deadline and to the specifications set out by Royal Mail.
- Responsible for making sure all deadlines are met for getting the Freepost accepted by the Royal Mail.
- Responsible for getting supporters to report back when they receive the Freepost, so any problems with non-delivery can be taken up with Royal Mail.

Candidate's diary officer

- Responsible for organising, writing and monitoring the candidate's diary throughout the campaign.
- Ensures that the candidate's time and effort are paced throughout the campaign and that sufficient time is programmed in for travel between engagements and for rest periods and meals.
- Ensures that the programme is sufficiently flexible to accommodate press interest and interviews.
- Responsible for the candidate's whereabouts on polling day and after the count – especially in target seats.
- Ensures that candidate has the thank you party in their post-election diary and also time booked in to make thank you phone calls to key helpers.

Candidate's driver

- Responsible for driving the candidate throughout the campaign. Many candidates will resist this but should be over-ruled – speeding tickets are very embarrassing during a campaign and a possible accident even worse.
- Responsible for delivering the candidate to venues, and on time, as detailed in the candidate's diary.
- Responsible for dropping the candidate home each evening when campaigning and meetings have finished.
- Responsibility ends after delivering the candidate home after the declaration and post-poll party.

Candidate's aide

- Accompanies the candidate on all campaign activities and appointments. Leads the candidate's team of canvassers, etc.
- Responsible for protecting the Candidate from difficult or unpleasant situations. Diplomatic skills and unfailing politeness are a must.
- Responsible for keeping the candidate and her team on time. In charge of the team when out and about – subject only to the agent's instructions.
- Responsible for ensuring photographs are taken when out campaigning and social media updates posted.
- Responsibility ends after delivering the candidate home after the declaration and post-poll party.

Press officer

- No-one else, apart from the agent and candidate, should ever talk to reporters, unless requested to by the press officer or agent.
- Responsible for all liaison with the media regarding the campaign.
- Works closely with the press officer for the local Liberal Democrat council group(s) to coordinate press work.
- Responsible for keeping the media informed of the candidate's activities and building relationships with journalists.
- Responsible for writing and issuing all news releases, briefing notes and operational notes to do with the campaign.
- Responsibility ends after issuing news release commenting on the local and national aspects of the election result to the relevant local media.

Casework officer

- Responsible for making sure all casework received by the campaign is promptly and efficiently dealt with.
- Responsible for ensuring that where data can be saved in Connect within data protection rules it is.
- Responsible for liaising with party HQ to ensure that party briefings on how to reply to common policy questions are available and used.
- Liaises with relevant Lib Dem councillors regarding any casework which would be better handled at the council level.
- Responsible for dealing with both personal and policy enquiries which are received by the candidate.
- Responsibility ends when completed cases are filed securely for future reference after Polling Day, and any unresolved cases have been passed on to a responsible individual for further action.

Meetings and special events officer

- Responsible for booking, organising and running the adoption meeting, post-poll party and subsequent thank you party.
- Organises supporters to attend the public meetings held in the constituency by other organisations such as the Churches. In nearly all seats you should not organise your own public meetings as they are a big drain on resources and seldom win any extra votes. An unsuccessful meeting can cost a bomb and lose votes.
- Responsible for running special events such as photo opportunities, street table sessions (for collecting petition signatures etc.) and walkabouts.
- Ensures that the candidate has an appropriate team of supporters at such events.
- Responsible for providing all the 'props' such as helium balloons, rosettes, posters and stickers for walkabouts or flyers, recruitment forms, and appeals buckets for meetings.
- Works closely with the candidate's programme officer, the press officer and the candidate's aide.

Target seat support coordinator

- Responsible for coordinating support for your adopted target seat during the campaign and on polling day. Includes identifying any local party training needs (e.g. canvassing, using Connect) and encouraging target seat to provide such training to volunteers who go there to help.
- Regularly liaises with target seat over what help is needed and when.
- Responsible for ensuring local members and helpers know about the adopted target seat and why helping it is important.
- Works closely with virtual phone bank officer and polling day organiser.
- Responsibility ends when all volunteers who helped the target seat operation have been thanked after the election.

Data officer

- Responsible for running the Connect member/helper data operation.
- Responsible for ensuring all volunteers who need access to Connect have a working login with appropriate permission levels.
- Responsible for briefing and supporting data entry volunteers, including checking on the quality of data entered and status of data entry backlogs.

- Responsible for ensuring other team members have access to the data they need for their roles and that they have the access and training they need to record the data their roles generates.
- Responsible for ensuring data coming in from all different sources (e.g. email, social media, websites, canvassing, street stalls) is entered into and coordinated with Connect.
- Responsible for ensuring the electoral register and absent voter data in Connect are up-to-date and all the membership and helper information is up-to-date.
- Liaises with the canvassing officer and virtual phone bank coordinator to ensure the right filters and scripts available for their work and that all canvass data is correctly recorded.
- Responsible for producing canvass cards, backup knock-up lists and shuttleworths as required.
- Responsible for setting up computers and printers in committee rooms on polling day and that both polling day organiser and agent have access to the right statistics to manage polling day.
- Responsibility ends when all the campaign data and the marked register data (official list of who voted) has been obtained and has been entered.

Digital campaigns manager

- Responsible for ensuring local party and candidate website and social network profiles are maintained during the campaign, including regular updates and responding where appropriate to supporters and the public. This includes any private forums, such as a private Facebook group for campaign helpers (often called a 'Virtual HQ').
- Responsible for ensuring emails to voters, supporters and helpers are sent out regularly.
- Responsible for setting up and maintain online surveys and petitions as required (e.g. with NationBuilder, Prater Raines, MailChimp or Google Docs).
- Responsible for ensuring all other team members are fully briefed on the importance of gathering email addresses through canvassing, collection forms at a meeting etc. – and that they act on this.
- Responsible for ensuring data gathered via digital campaigning is recorded in Connect.
- Liaises with local party webmaster, councillors and others with a digital presence during the campaign.
- Ensures the information about local party and candidate on the party's websites and elsewhere is correct.

- Monitors local community websites and discussion boards for comments that need a response or for stories that should be followed up.
- On the day after Polling Day, sends a post-election thank you email to members, helpers and the public. Posts a thank you message and final constituency result on the website and updates Facebook/Twitter as appropriate.

Polling day organiser

- Responsible for coordinating polling day activity across the constituency and polling day support for your adopted target seat.
- Responsible for deciding, with the agent, if a full polling day operation should be run anywhere in the constituency. In particular, it may make sense to have a very thin or non-existent operation in some areas in order to concentrate on key council wards or to help in a nearby Parliamentary target seat.
- Responsible for making sure tellers are found in advance, where appropriate. (Only use people who are not willing to knock up or telephone campaign as tellers.)
- Responsible for arranging that appropriate supplies and equipment is supplied to all the committee rooms being run in the constituency on polling day.
- Responsible for ensuring all polling day helpers are recorded in Connect's MyCampaign.
- Works closely with the data officer, press officer and the meetings and special events organiser.
- Responsibility ends when all polling day helpers have been thanked after the election.

Recruitment officer

- Responsible for following up all potential new members during the campaign.
- Works closely with the canvassing officer; the job is often done by the same person. Only a very big team will have different people doing this job.
- The best time to ask anyone to join the party is very soon after they express an interest – the more days you leave it, the lower their chance of joining.
- Responsibility does not end with polling day as after polling day all helpers and poster sites should be asked to join, along with any newly identified strong supporters of the party.

Recording data if you don't have Connect

You will notice that many of these job descriptions refer to storing data safely. That is because data is so important to the party's long-term health. Even a few email addresses and a couple of helpers available for use at a future election can help make the vital difference between winning or losing an extra seat.

So even if your campaign is at a minimal level in a seat which does not yet have Connect, safely and appropriately recording data – including from messages that come in from voters during the campaign - for future use is important.

If you do not have Connect yet, there are still two useful ways to store data. First, remember that information about members and lapsed members can be added to the party's membership database system. Updating email and telephone data in there, as well as any new postal addresses, is very valuable.

Second, if you record data in a spreadsheet with separate columns for name, address, postcode and then one column each for the relevant data (e.g. email address, known Lib Dem etc.) then afterwards you can contact the Connect support team about getting that information stored. That will also mean it is available locally for future elections when your local party does get Connect.

8. Useful IT equipment

You do not have to be an IT whizz by any means to be an election agent, but there are a few useful things to know.

Mobile phone

These do not really count as IT equipment anymore, but the agent, candidate and candidate's aide should all have a mobile. It is essential for them all to be able to contact each other very short notice.

Be careful who has the number of these phones. You do not want them bothered by all and sundry when out campaigning. Some agents and candidates, therefore, get a pay-as-you-go phone for the election so that they do not have to give out their normal (private) number.

Also look for a package with free or very cheap voicemail and a good bundle of free text messages as both get heavy use in most campaigns.

Email

A lot of your correspondence to do with the election will be via email and you may well need to refer to messages after the election, such as when doing the election expense returns. Some people, therefore, set up a separate email account to conveniently keep everything in one place, or if they use their main email address they create a separate folder or category.

Make sure your emails are securely backed up, either because you're using a reputable web-based email service or because you backup your own machine. A hard disk failure that destroys lots of emails would otherwise be a big headache.

Some of the emails you send and receive may be quite large, such as with attached pdfs of leaflet artwork. A good, high-speed broadband internet connection is very helpful if practical.

Laser printer

Being an agent often involves printing off forms, instructions and other information. You will find it much easier if you have a faster printer to hand – probably a laser printer – and if you make sure to stock up on paper and toner in advance.

Campaigns will also need to have good laser printers to print off target letters. For the most intensive campaigns, it is a good idea to have several laser printers. That way not only is it quicker to print large direct mail runs but also you have some redundancy in case one printer breaks down late at night.

Do not print canvass cards on ink jet printers – the ink runs in the rain. Use a laser printer instead.

Digital camera

Digital cameras are now nearly essential. They are great for getting up-to-date action shots into your leaflets and for use online.

Beware that some cheap digital cameras (and many smartphones) take photos that do not reproduce well when used at a reasonable size in leaflets. You should make sure that the campaign has access to at least one good one. This does not need to be a top of the range professional camera. Many compact digital cameras produce excellent quality photos.

Desktop publishing (DTP)

The agent does not need to artwork leaflets themselves and usually doesn't. It is best if whoever does has the desktop publishing package PagePlus as this is the standard used in the party.

If you use PagePlus then you can use templates supplied by the party, which makes producing leaflets much quicker and easier.

Connect

This is the party's database for storing the electoral register and information about voters. Find out if your local party has purchased it yet and who in the local party operates it.

As an agent, you won't have to directly use it for your agent tasks but it is a key part of the campaign for doing things such as producing canvass cards and delivery maps.

Accounts software

Most agents do not use an accounts package but rather rely on something simpler, such as Microsoft Excel, to track the campaign's finances.

If you are already used to using a full accounts package, you may find that useful but otherwise now is not the time to get to grips with a new package.

Backup your data: you'll be grateful you do the time you lose a key piece of financial information just before a legal deadline!

9. Basic survival guide for a candidate

Being the candidate in a general election is one of the most stressful experiences a person can have (apart from being the agent!).

Thinking a few things through in advance is as important to the candidate as it is to you. Make sure the candidate's diary takes these points into account.

Find out whether the candidate is a morning or night time person and how much stamina they have. Everyone has a low point in the day. When does it hit the candidate? If both of you are lethargic and sleepy at 3pm it is unwise to have important campaign meetings at that time.

What domestic responsibilities do they have? Can you find people to help out with any of them?

What work responsibilities will they have during the campaign - and how can you work around them?

How supportive is their partner when it comes to the crunch? What can you do to make them feel more involved and reassure them of their importance in the scheme of things? Start by talking to them and listening to what they have to say.

Does the candidate have any health problems you need to be aware of, e.g. an ulcer (not uncommon in activists)? This would mean they would need to eat at regular times.

Is there anyone on the campaign likely to annoy or unsettle the candidate? If there is, then find them a job which keeps them busy and out of the candidate's way. Is there an activist with a crush on the candidate? (A common problem!) Make sure you avoid sending them anywhere alone with the candidate. Give them a job which does not involve regular contact with the candidate.

If the candidate is staying away from home, are they comfortable? Are they going to get enough sleep? Or will their hosts want to talk all night?

Sorting these potential problems in advance will keep the candidate sane through the campaign.

Don't drive

Once an election is called and a driver has been selected, the candidate should effectively surrender their keys. From now on, until a few days after the result, they will now be chauffeured everywhere. They will be thinking of too much in the campaign and dreaming too much of the result, to be allowed the risk of having an accident or bad publicity. The driver picks the candidate up every morning to travel in for the daily briefing and drops them off at home at night.

Don't spend money

The candidate's aide should have a cash float and use that to cover any costs incurred. From buying raffle tickets and cakes at fetes, through to coffee mornings and lunchtime in the pub – the aide will physically pay for everything. If the candidate goes into an event with another person – check whether the other person has some loose change (as a polite way of reminding them that they should be the one to spend money, if any is needed).

Effectively, the candidate could leave their money at home. This is to avoid any charges of "treating". Treating is giving or promising money or favours during an election that might influence someone to vote for the candidate. It is a very serious offence. The candidate should even avoid saying they will buy a friend, who is a voter in the constituency, a drink 'when the election is over'. It could be regarded as treating.

Don't overdo it in the evening

Even if everyone goes to the pub every night, make sure the candidate goes home as soon as they can at the end of the day and gets to unwind and sleep.

If they do go out for an evening meal or drink, encourage them to make it quick. They will need to be up early every morning, bright and breezy!

Don't get drunk

During the day, the candidate will constantly be meeting members of the public. They need to be alert and must avoid alcohol on their breath. In hospitality suites, before interviews and debates, they should choose soft drinks (alcohol will make the face red and blunt responses). In the evening, if the candidate wants to relax – fine, but at no time in the campaign risk even a mild hangover.

Don't get burnt out

No matter how keen you are, everyone needs to rest. Find out if your candidate is a morning or evening person and plan accordingly.

A burnt-out candidate is no good to anyone. Make sure they get some personal space timetabled every day, even if it is just 15 minutes to sit back, put their feet up and close their eyes in the mid-afternoon.

Some people can cope on less sleep than others. During an election, some candidates virtually stop sleeping at all. If this happens it is even more vital they have time to relax, e.g. a brisk walk or a session at the gym – even if they have to be forced to take it!

Don't agree to anything on the spot

If the candidate is invited to an event or meeting, they should show interest but not agree at once. People should either be referred to the diary officer or their details should be passed on.

This avoids the candidate having to say a blunt 'no', allows the credibility of the events to be checked and avoids the embarrassment of double-booking.

This is particularly important if your seat is a marginal between two other parties. This would make the seat of interest to the media. As a result, your candidate might come under a lot more scrutiny than you expected for a distant third place last time.

The aide

The candidate's aide or 'minder' is a key member of the team and should be chosen carefully. The aide will take charge of the candidate and their activities. The aide must be able to take responsibility and, when necessary, take control. They will be responsible for the candidate, the candidate's team and the implementation of the daily programme.

The role of the candidate's aide is, on the surface, one of the most straightforward. It basically means making sure the candidate is in the right place at the right time.

Like most roles in an election, however, it often turns out to be a lot harder than it appears at first. In a high-profile campaign, it can become a hugely complex and exhausting task. If performed badly it will have serious knock-on effects on the rest of the campaign. Most importantly it will lower the morale and performance of the candidate.

The ideal aide will have:

- The diplomacy of a saint.
- Fanatical time-keeping.
- Constant attention to detail.
- An eye for personal presentation.
- The ability to present the campaign message...
- ... and the initiative to dump all the above in an emergency!

The aide needs to be well-equipped with a mobile phone and portable charger, so that s/he is in constant touch with the headquarters. The team also needs a suitable vehicle (with a driver, if a separate team member is available).

An up to date Sat Nav system is also very helpful. It will help you to be sure how long travel will take to different meetings and venues. Google Maps give live travel data and can be downloaded to smartphones. However, there is no point relying on this if the phone in question is in constant use! In that case, a simple TomTom or similar system may be a better bet.

Remember that the aide oversees that part of the campaign which is on display to the press and public all day, every day. Even lunch is part of the campaign!

This is tiring work. The aide should be given some time off – tiredness will bring with it irritability and mediocre performance. This is equally true for any full-time member of the team.

Looking after the candidate

The most important task of the aide is to look after the candidate. They must be able to build up a relationship so that the aide can interpret how the candidate feels and anticipate her reactions. They need to know what motivates the candidate and what worries them. The aide needs to understand what their candidate's strengths and weaknesses are.

At the start of any campaign, the candidate is often nervous. They will often be preoccupied with either public image or policy knowledge. Make sure they get as much practice as the team feels is necessary.

Be aware that the candidate is on show 24 hours a day. They smile for the cameras, they are nice to all the members of the public and pleasant to the opposition. In the headquarters, they regularly thank the volunteers (make sure they visit the workers in the building whenever

they have a chance). They even need to be in a good mood around their friends and family.

Being a candidate can feel very lonely

The aide needs to need to be one of the few people the candidate can scream at in private when they need to let off some steam. If the candidate is worried about any part of the campaign, the aide must pass this on to the agent. Then action can be taken and the candidate can stop worrying about it.

Life outside politics

In the candidate's head, all things other than the election are likely to be put on hold. This can mean forgetting to pay essential bills like the phone or the car tax. Check this kind of thing with them at the beginning of the campaign.

Make sure that the candidate does not lose touch with their home life. If the candidate has a family, don't forget that they will be caught up in the election.

Make sure that the family is kept in touch with what the candidate is up to. This may mean producing a personalised version of the candidate's diary for the candidate's partner and timetabling some space for being with children. Try putting together a wall planner for the candidate's kitchen to keep them in the loop daily.

Remember that the family have the same agenda for the candidate as you do - protecting their sanity and ensuring their success.

Remember they can be a valuable help in letting you know how the candidate is feeling and what's concerning them.

Sit down with your candidate and map out any vital things they must remember during the campaign, such as visiting a parent for a birthday lunch or attending a school play. Make sure these are in the diary. All the team should probably stock up on birthday cards for emergencies too!

Keeping tabs on the candidate

The aide must know where the candidate is throughout the campaign, even when not with them.

The aide does not need to stay attached like a limpet throughout the day. There will be times when they go somewhere with someone else, such as with the press officer to meet a local newspaper editor. But, the aide must know exactly where they are going and how they can be contacted.

Most of the time, however, the aide will be with the candidate. Since the two of them are likely to be around each other for up to 14 hours each day, you need to make sure that the timetable gives them some time apart – no matter how good their relationship!

The aide will need to boost the candidate's morale when down and bring them down to earth when on a high. Sometimes the aide just needs to leave them alone!

It is important to find out what helps the candidate relax and unwind, such as swimming, walking, sleeping. If they become stressed and irritable in the middle of the campaign you might need to scrap an unimportant session in the itinerary and send them off to relax.

Neck, shoulder and back problems are common for candidates during elections. A weekly massage from a physiotherapist can work wonders.

Help with the candidate's appearance

There are some things that even your best friend won't tell you but your aide or agent should though be diplomatic! For example, if your candidate has bad breath, explain that this is a frequent consequence of campaigning hard and suggest ways of avoiding developing the problem.

Make sure you both drink plenty of water and suck breath freshener mints both before and in between meetings (Smints are good). If the candidate resists this, be firm. Explain that bad breath is the best way to lose votes and that you don't think it is a risk worth taking. If they do not like mints find an alternative breath freshener spray at the chemist.

If the weather is hot be aware of the candidate getting too hot and sweaty. If this is a problem, factor in a shower break at least once a day and encourage the candidate to use a suitably low perfumed antiperspirant deodorant.

Some male candidates, especially those with very dark hair, need to shave several times a day. Plan breaks for this or get him to try using an electric razor in between wet shaves. Keep the electric razor in the car.

Equipment

A mobile phone is essential for the candidate. A full list of HQ, mobile and other useful phone numbers should be kept in the vehicle – preferably taped down, possibly to the inside of the glove box. Alternatively, they should be entered in the mobile's contact book. Carry charging leads, a car charger, spare battery or recharging battery or block with you. A flat phone battery is all too common.

Make sure that the campaign vehicle is filled with fuel each evening before the driver retires so that there is no need for unscheduled stops in the day.

Make sure that the vehicle is kept clean and tidy. If it gets muddy on the outside get it cleaned and polished as otherwise, it creates a bad impression on arrival before the candidate even gets out of the vehicle.

Keep a box in the car stocked with posters, calling leaflets/handout leaflets and a bundle of recent leaflets. Before the deadlines, carry some postal vote application forms. It is also wise to stock a bag with mineral water, aspirin, paracetamol, mints, a hand towel, comb/brush (candidate's own), hand mirror, make-up (men and women), a spare shirt or blouse, spare tights for a female candidate, clean tie for a male candidate. You never know when a small child will drop ice cream all over the candidate!

In summery weather, carry a tube of sun block and a cool box with plenty of cold drinks for the team. Damp face flannels can be taken out of the freezer in the morning and will help keep the cool box cold. Then you can wash sticky fingers at any time. Put them through the wash every night.

Keep waterproof jackets and wellington boots handy for visits to farms, some factories and building sites.

Also make sure there is a good digital camera, an umbrella (party colours are safest), a pad and pen to make notes of casework, poster sites and the events advertised on community notice boards.

10. Electoral register

The electoral register is the official list of everyone who is entitled to vote. As well as being used for deciding who gets ballot papers, it is also used to decide who can nominate candidates (the nominators have to be on the electoral register) and for calculating the election expense limit (which varies depending on the how many electors are in a constituency).

The agent needs a copy of the electoral register in order to get the legal details of their role right.

More details about electoral registration are in the ALDC Election Law Handbook, but as a general election agent, the key things you need to know are set out in this section.

Electoral Registration Officers (EROs)

The electoral register is maintained by the local council, so having a good working relationship with the Electoral Registration Officer (ERO) is very useful. If you do not already know them, introduce yourself to them as soon as you are appointed an agent.

Having a good working relationship with the ERO makes life much easier.

The ERO is also the person who will hand out nomination papers and associated paperwork, including a list of legal deadlines, and to whom, after the election, you submit election expense returns.

Some are excellent; some are out of their depth. In case you have the second variety, be sure to check up on anything they tell you which sounds wrong or unlikely.

The ERO's job may be complicated by Westminster constituency boundaries which overlap into different council areas. One ERO will lead for each constituency but it may have wards from several council areas included in it.

Getting copies of the electoral register

The party already has procedures in place to get copies of the electoral register to upload to the party's Connect database system.

In addition, agents find it useful to have their own copy to use for sorting out nomination forms. You can get this in paper (printed) format or often EROs will be happy to provide a pdf of the printed version, which is then easier to use.

There are strict rules on who is entitled to a copy of the full electoral register and so you will need to use one of the entitled categories. See the ALDC Election Law Handbook (chapter 5) for more details but in brief, the local party will have someone appointed by party HQ as the Delegated Nominating Officer (DNO) who is entitled to get a free copy of the full electoral register.

In addition, a candidate is entitled to a copy (which the agent can ask for on their behalf). However, if you want the register to sort out nomination papers that can mean getting a copy of it before the candidate is strictly speaking the candidate! Most EROs are helpfully flexible over this, but if you encounter an obdurate one, using the DNO's rights to a copy of the register will get you a copy in good time.

Agents can also ask the ERO to confirm the number of electors. This is important for calculating election expense limits and is not that easy to do simply from the full electoral register because the register is not simply numbered consecutively.

EROs will tell you what they think the election expense limit is based on the register but make sure you check their sums yourself as the legal onus is on the agent to get this right.

Getting supporters registered

The last date for joining the electoral register and still being able to vote in the 2017 general election is 22 May. During the campaign, therefore, the team may well encounter supporters who are not yet registered to vote.

Point them at either the local council or www.gov.uk/register-to-vote. If you are campaigning in an area with a high number of unregistered people, it can be useful to get some electoral registration forms from the

council and ensure that campaigners have them, ready to hand over as necessary when they meet people.

Correcting errors on the electoral register

The ERO is also the person to contact about any errors you find on the electoral register.

It may be that when out canvassing, you find a block of flats has been demolished or perhaps someone complains that a letter we've sent them from Connect has their name wrong because it is wrong on the electoral register. Either way, letting the ERO know about such errors is both a good piece of civic duty and also a good way of building up your relationship with them.

Different versions of the electoral register

The electoral register gets updated every month, so both when doing nomination papers and calculating election expense limits it is important to use the right version of the register.

The version that matters is the one in force on the last day for publication of the notice of election. People who are on that register and will turn 18 by polling day (i.e. can vote in the election) can sign a nomination paper even if they are not 18 on the day they sign it.¹

Watch out also that the versions of the electoral register used for different sorts of elections are usually compiled into one document. If, for example, someone is a peer of the realm, and so entitled to vote in a local election but not a Parliamentary one, their name will appear on "the register" but they won't be able to sign a nomination paper for the general election nor does their presence count for calculating the expense limit. All such people will have a letter next to their name. Further details are in the ALDC Election Law Handbook.

Finally, make sure you are always using the "full" electoral register and not the "edited" version which is the one sold to commercial mailing firms etc. and which excludes people who have opted out from this sort of marketing. Parties and candidates are entitled to the full register.

¹ Or 16 in the case of Scottish Parliament and Scottish local council elections.

11. Nominating the candidate

Getting your candidate safely nominated and on the ballot paper is one of the two most important steps as an agent. The second is filing the election expense returns afterwards. That way we have a candidate both on the ballot paper and kept out of jail.

To successfully nominate a candidate, you will need to sort:

- The DNO paperwork (see chapter 12)
- The deposit
- Nomination paperwork

The ERO will provide you on request with a pack of nomination paperwork, but always use the party's own DNO paperwork (for the reasons explained in chapter 12).

The legal deadlines for completing and returning this paperwork, including the DNO paperwork and the deposit, are absolute (see appendixes).

Late paperwork = no candidate. There are no deadline extensions under any circumstances.

The paperwork and deposit must be submitted by hand to the Returning Officer by the candidate, agent, proposer or seconder. Email and fax do not count, and even leaving the paperwork in an envelope through the council letterbox has been ruled inadmissible in the past.

You can ask the Returning Officer to informally check your papers for any mistakes or problems before you formally hand them over with the deposit. This is particularly useful because if you formally hand in papers that are faulty, you then must go and collect a completely new set of nomination signatures from new people.

Therefore it is best to have the agent submit the paperwork, so you can discuss any issues with the Returning Officer and resolve any problems.

Do not leave this task until the last minute.

Hand in the nomination papers at least 48 hours early to avoid a last-minute crisis.

That way, if there is a problem you still have time to get it sorted out.

The one exception is the DNO paperwork which can be submitted by post (but this is very risky – you don't want a candidate knocked out because the post went wrong).

The deposit

The current deposit for a Westminster Parliamentary election is £500. It must be paid by 4pm on the last day for nominations. There is no deposit for local elections so this is the main difference from what you may be used to agenting local elections.

You must pay the deposit at the same time that you hand in the nomination papers. The deposit does not count towards the election expenses limit.

You often will have to pay the deposit using either cash or a Bankers Draft – which will take a couple of days to organise. Returning Officers have the discretion to accept payment by credit or debit card, but it only discretion, so check first.

Cash is usually best, as there is much less that can go wrong.

Providing the candidate gets 5% of the votes cast, the deposit will be returned. Usually, this is done either at the count or at an appointment with the Returning Officer the next day. It will probably be given back to you in the form of a cheque.

Nomination paperwork

In addition to the DNO paperwork and the deposit, your completed nomination paperwork should include:

- The candidate's 'Consent to Nomination' form.
- The 'Appointment of Agent', and 'Agent's Consent' forms.
- One or more sheet of 'nomination papers' signed by suitably qualified voters (only one sheet is required, but it may be traditional in your area to submit two or three; you need 10 signatures from different electors to successfully nominate a candidate²).

² There is nothing explicit in election law which stops a candidate also being one of their own nomination signatures is they are otherwise qualified to be a nominator. It is just about possible that one day a legal test case will address the question of whether there is an implicit requirement in the rules for the nominators to be other

- Home address form.

Avoid using Tippex on these forms. Forms have been rejected in the past on the grounds that Tippex had been used.

The nomination paper requires you to list the "description" (i.e. party label) you want to appear next to our candidate's name on the ballot paper. This must match either the party's official name or one of the official party descriptions registered by the party with the Electoral Commission. It must also **exactly** match the version authorised by the DNO on their paperwork (see chapter 12, which also covers how the DNO authorises the use of the party logo).

In England, you should use "Liberal Democrats" (with an s at the end, and no "the" at the start). In Scotland and Wales, the Scottish and Welsh versions of the party name are often preferred. The DNO has a list of the full set of options (the official party name and all the registered descriptions) to choose from – and remember the DNO must authorise exactly the version put on the nomination paper.

Is your candidate qualified to stand?

Make sure you read all the regulations about disqualifications for a candidate below. Then talk to your candidate well before nomination day to make sure none apply to them. S/he should have been asked during the candidate approval process. Be particularly careful if the candidate was chosen at very short notice for whatever reason.

Certain categories of people are not eligible to stand for Parliament. In broad terms, these categories are:

- **Aliens:** those who are not British subjects, qualified Commonwealth citizens or citizens of the Republic of Ireland. Citizens of EU countries are not eligible to stand.
- **Infants:** people under the age of 18.
- **Mentally ill:** if their illness means they are not in possession of their mental faculties.
- **Peers and some bishops:** people who can vote in the current House of Lords.
- **Bankrupts:** bankruptcy in itself is not a disqualification, but a person is disqualified if (1) they are currently subject to a bankruptcy restrictions order or debt relief restrictions order made

people, so our advice is (a) don't use self-nomination ourselves, but (b) don't get too excited if anyone else does. In 2016 the Electoral Commission's "English Regional Teams" sent an email to a Liberal Democrat activist saying their view is that candidates can self-nominate.

by a court in England, Wales or Northern Ireland, or (2) their estate has been sequestrated by a court in Scotland and they have not been discharged.

- **Convicts:** currently in jail serving a sentence of more than 12 months. (For local government elections, it is anyone jailed for three months or more, without the option of a fine, in the five years before polling day.)
- **Certain office-holders:** civil servants, members of the Armed Forces, police, those holding certain judicial offices, and members of named tribunals, commissions and bodies, e.g. chair of a health trust.
- **Disqualified:** by reason of having been convicted of certain election offences.

These disqualifications are similar to, but not exactly the same as, those for local government and other elected posts. Do not assume that because someone has stood, or even been elected, to another public office that they are qualified to stand for Parliament.

The regulations which commonly cause trouble relate to age, office holders and bankruptcy. For their own reasons, candidates have been known to be 'economical with the truth' regarding these points.

Note: "Deaf and dumb" people are eligible to stand for Parliament but many standard reference works suggest incorrectly that such people cannot stand. Contact party HQ for further information if you are likely to have a candidate in this situation.

Commonly known as...

If your candidate's full name is not obviously the same as his or her campaign name, you can indicate this on the nomination paper. For example, your candidate may be known as Alex, Bobby or even Paddy! His or her real name may be Alastair, Roberta or John.

The form must give the candidate's surname, other names in full (no initials) and then, if wished, a 'commonly used' name, to be used on the ballot paper instead of the full name. You must be able to show that any 'commonly used' name is really in use, such as a credit card statement, bank statement or utility bill.

A married woman may, if she wishes, stand under a different name from her partner if that is the name she is widely known as either in politics particularly or in life generally. For example, this may be her maiden name or her name from a previous marriage. She will not need to use the

'commonly known as...' form of nomination detailed above. In the case of a challenge, she will need to be able to provide:

- A history of campaigning or working under the name she wishes to use as the candidate, and
- Proof that she is known by that name – e.g. a credit card bill or a bank account statement.

We recommend that women candidates in this situation should open a bank account in their campaign name. This should be done well in advance of the campaign, as an easy way of proving her right to stand under this name.

(This area of law is not fully tested out yet in the case of same-sex marriages, so please check with party HQ if a similar naming issue arises in the case of a same-sex couple.)

A candidate cannot use the 'commonly used name' option to skip their middle names, as the Electoral Commission's advice explains:

We have received a number of enquiries as to whether a candidate standing for election can use their first name as a commonly used name so that only their first and surname appear on a ballot paper, thus excluding their middle name.

For example, in the case of Andrew John Smith, the question would be whether he could use 'Andrew' in the commonly used name box and appear on the ballot paper as Andrew Smith.

The legislation makes it clear that a commonly used name is one which is different from any other forename or surname. This means that a forename in its original format cannot be used as a commonly used name.

If a candidate wishes to use a commonly used forename and/or surname then these must be different from their full name as it appears on the nomination paper. Therefore, in the case of Andrew John Smith, he could not use Andrew Smith as his commonly used name, although he would be able to use Andy Smith (if Andy was the name by which he is commonly known).³

³ Electoral Administration Bulletin, Issue 99 (England and Wales edition), 6 March 2015.

The candidate's Consent to Nomination form

Read the form carefully and fill in as indicated. There are some special provisions for getting this form (only) signed and returned if your candidate is going to be out of the country – check with party HQ or ALDC.

Check again that your candidate is qualified to stand and that none of the disqualifications applies to them.

Also remember that, once the deadline for the nomination has passed, your candidate cannot be replaced. They may later want to withdraw but we cannot then nominate someone else. If tragedy strikes and your candidate dies, contact Liberal Democrat HQ ASAP. The law about what happens next is relatively complicated.

Appointment of Agent form

If this form is not submitted, the candidate is deemed to be their own agent. This is not advisable.

The form requires providing a contact address for the campaign. For parliamentary elections, the address used must be:

- within the constituency, or
- within a district which is partly comprised in or adjoins the constituency, or
- within a constituency which adjoins the constituency, or
- within Wales, within a Welsh county borough which is part of, or adjoins, the constituency, or
- within London, within a London borough which is part of, or adjoins, the constituency.

Remember when supplying an address to which communications can be sent, if you use the address of your Campaign HQ and you move out of it immediately after Polling Day, you may not receive vital communications.

Sometimes EROs omit the Appointment of Agent forms from the paperwork pack they supply. If this happens, ask them to supply one or download one from the Electoral Commission's website.

Signatures from voters

You need at least 10 signatures from voters in the constituency to nominate a candidate for that constituency.

Make sure you use the correct version of the electoral register for verifying whether people are qualified to sign and not an earlier version – as people may drop off the register and, even if they stay on it, their register number may change.

Although it has become a tradition to ask voters to sign their names exactly as they appear on the register, this is not a legal requirement. The law says 'signature'. However, be careful if anyone has an illegible signature, or usually signs a name which bears little resemblance to their electoral register entry!

If in doubt, it may be better to ask them to sign as per the register. Otherwise, the Returning Officer might reject the paper on the grounds they cannot tell if the signature is a true one.

Regardless, the candidate and agent should give their full names on their parts of the paperwork.

Once signed, the nomination paper cannot be altered – so ensure it is done carefully and people signing their names are given specific instructions.

A person may not sign more nomination papers than there are vacancies; for example, one person can sign two papers for a two-member local election ward, but they can only nominate one candidate for a Westminster election. If someone signs too many forms, the Returning Officer will only accept the first of these to be delivered, and reject subsequent nomination papers.

The law is ambiguously silent on whether or not a candidate can nominate themselves by being one of the ten signatures on their own nomination paperwork. We strongly advise against doing this as there is no glory in being the test case in which the law is clarified – but there would be a lot of cost, time and headaches.

Home Address form

This is a newer part of the nominations process, introduced shortly before the 2010 general election, which lets the candidate specify whether they wish to have their home address or just the constituency where they live (or country, if outside the UK) given on the ballot paper. If used, the home address must be completed in full and without abbreviations. It cannot be a business address but does not need to be in the constituency.

Things to avoid

- **Counting the days wrong:** the election timetable from ALDC gives the dates in the calendar. Sometimes you may see elsewhere reference to events happening 'x days' before/after something else. Most, but not quite all, such counting of days for election law purposes is done excluding Saturdays, Sundays, Christmas Eve, Christmas Day, Boxing Day, Good Friday and bank holidays. That is why it is much easier to stick with using ALDC's timetable rather than trying to work out the timetable for yourself.
- **Sub-agents:** Under the law, the Election Agent may appoint official sub-agents in county (but not borough) constituencies. Don't. There are a few very specialised circumstances when this is done, mainly in PR-type elections, but as a general rule causes many potential problems. So don't appoint sub-agents. If you (the agent) fall seriously ill or otherwise are unable to do the role, seek advice from party HQ on how best to handle this immediately instead.
- **Section 75 forms:** these are an antiquated way of controlling election expenditure which is no longer sensible. Do not use any Section 75 return forms that you encounter.

12. Political party names

The law ensures that only official Liberal Democrat candidates can use our name (or variants of it) and logo on their ballot paper. It also stops another candidate using something similar which might mislead the voters.

Therefore, to get our party name (or one of our officially registered variations) and logo to appear on the ballot paper next to a candidate's name, an extra piece of paperwork needs to be completed alongside the nomination papers.

This paperwork needs to be signed by the Delegated Nominating Officer (DNO), who is the person the party has appointed locally to authorise the use of name and logo.

The DNO will have a certificate showing their appointment which then needs to show to the Returning Officer to prove their appointment. Then they also need to sign a form that goes in with the nomination paperwork. This certificate also says the DNO is entitled to ask for a copy of the electoral register on behalf of the party (see above).

DNOs are all provided with a standard party form to use to request the use of the party name and logo. It is much better to use this form rather than the generic form handed out by councils, as the party form includes pictures of the party's logos, making it much less likely that a mistake will occur over the logo.

Make sure you use the latest version of the form from party HQ so that you are using one with the latest versions of the party logos.

As well as the party's official name, the party has a set of alternative descriptions registered and the DNO must specify whether it is the official party name or one of these officially registered descriptions that should be used. It must be the name or one of the descriptions used – no other form of words can be asked for.

Whatever the DNO's form says must match **exactly** with what is put on the nomination paperwork. Even a difference between Democrats and Democrat – just the S different – is enough to disqualify a candidate.

If no DNO form is submitted with the nominations, our candidate won't be able to stand.

It is also useful to submit an extra photocopy of the DNO certificate with any nomination papers – it is remarkable how many copies are lost by councils.⁴

Emergency backup DNOs

In addition to the local DNOs, each region and state party has a series of "emergency" DNOs who can sign the paperwork if the local DNO is not available for some reason.

Inexperienced DNOs

Full details of what DNOs have to do are in the ALDC Election Law Handbook and in the forms and information they receive on appointment. If your local DNO isn't sure what to do or is new in the post, make sure they have access to this information.

Misbehaving DNOs

DNOs are required to sign the paperwork for any properly selected candidate for our party. In the event of a problem, such as a dispute over whether someone has been really selected as a candidate, contact the Compliance Team at Liberal Democrat HQ.

⁴ Best practice is that when first appointed, a new DNO should visit the Returning Officer to introduce themselves and show them their original certificate of appointment. Then whenever nomination paperwork is submitted subsequently, include a copy of the original certificate with them as a reminder that the DNO is legally appointed. For this purpose, a copy rather than the original certificate is sufficient, as confirmed by the Electoral Commission in its *Electoral Administration Bulletin* No.178 (England) 23 March 2017: "We have received several enquiries about whether parties must supply the 'original' delegation of authority document ... There is no need for this document to be submitted as part of a nomination. It is not a nomination paper. In practice, some candidates may supply this alongside their nomination papers, but it is not required. As such, if it is supplied, it can be supplied as a copy."

13. Postal and proxy voting

What it is all about

If someone is not able to vote in person on polling day, they can either apply for a postal vote (which means getting a ballot paper through the post) or for a proxy vote (which means appointing someone else to vote on your behalf). An appointed proxy can, in turn, apply for a postal vote, which is known as a postal proxy.

All these different forms of voting are collectively known as 'absent voting'.

Getting our supporters signed up

Even with the higher turnout at general elections compared to local elections, many people who support us don't quite get around to voting on the day. Getting supporters signed up to postal or proxy votes, therefore, results in more Liberal Democrat votes being cast.

Political parties are allowed to take active steps to encourage and help supporters get absent votes, but you must always be careful to ensure that everyone in the team follows the Electoral Commission's code of conduct.

Failure to do so can result in expulsion from the party.

You can read the full code in the appendixes but the key sections say:

Campaigners should be free to encourage voters to register to vote and apply to vote by post or appoint a proxy to vote on their behalf, if that is the most convenient way for them to vote...

Campaigners should ensure that any electoral registration forms and postal or proxy voting application forms conform fully to the requirements of electoral law, including all the necessary questions and the options open to electors...

Campaigners should send on unaltered any completed registration or absent vote application forms given to them to the relevant Electoral Registration Officer's address within two working days of receipt.

Voting records from previous polling days can give you clues as to which staunch supporters do not always vote – and so are prime candidates to target for signing up to postal votes. The Connect database can automatically identify the best prospects for you, and one very good tip is then to create a Virtual Phone Bank (VPB) to target them.

Agents, candidates and key are very busy on polling day. Getting a postal vote is a good idea.

Postal vote applications

The law does not set down a mandatory form to use. You could literally write a request on the back of an envelope and have it accepted. However, because of the requirements of the code of conduct, and to minimise the risk of problems you should always use a form from one of these places:

- Supplied by the local council
 - Downloaded from either the Electoral Commission or government website
 - Supplied centrally by the Liberal Democrats
-

Do not design your own forms.

When campaigning online, point people at www.aboutmyvote.co.uk/how-do-i-vote/voting-by-post - this is the official site from the Electoral Commission.

You can hand out forms to supporters, for example at local party fundraising events or when canvassing. Take good note of the point quoted above in the code of conduct about promptly handing over any completed forms to the ERO.

The forms are very simple to complete. The two most common problems are:

- People can only have a postal vote if they have registered under the new electoral registration system (individual electoral registration), and not if their details on the electoral register were simply copied over under the transition arrangements.
- If you want a postal ballot to be sent somewhere other than to your address on the electoral register, you must give a reason. There is a space to do this on the form.

Proxy vote applications

Proxy vote applications are more complicated than postal vote applications and are also more open to abuse. Therefore, it is best only to encourage people to use proxy votes when postal votes are not appropriate, such as if someone is travelling around Asia and so does not have a firm address at which to receive a postal vote.

Proxy votes can also be useful for late minute illness. The deadline for such emergency proxy votes is 5pm on polling day. (All the deadlines, for both postal and proxy votes, are in the ALDC election timetable.)

As with postal votes, you should only use forms which are:

- Supplied by the local council
- Downloaded from either the Electoral Commission or government website
- Supplied centrally by the Liberal Democrats

Do not design your own forms.

When campaigning online, point people at www.aboutmyvote.co.uk/how-do-i-vote/voting-by-proxy - this is the official site from the Electoral Commission. This website is also a very convenient reference point for all the different proxy vote application forms which cover the myriad of different rules depending on why someone wants a proxy. This large number of forms is one of the reasons why we strongly recommend using postal votes instead, which are much simpler.

The application for a proxy vote requires the name and address of someone who will act as the proxy. They must be individually registered on the electoral register; i.e. as with postal voting, they can't be simply someone whose details have been copied over from the old registration system under the transition arrangements.

A person cannot vote as a proxy for more than two electors in any particular constituency who are not close relatives. In local elections, the limit is two per ward, and for referendums, it is two per referendum.

Close relatives are the spouse, civil partner, parent, grandparent, brother, sister, child or grandchild of the applicant.

Getting lists of postal and proxy voters

Postal voters often vote shortly after receiving their ballot papers, which can even be weeks before the main polling day. Therefore, a key part of election campaigning is to target postal voters with extra literature and contacts ahead of when they vote. After all, canvassing a postal vote who has already voted isn't nearly as useful as talking to them before they have voted!

The party is legally entitled to ask for a list of postal and proxy voters from the ERO at any time. The list should then be uploaded into the party's Connect database system to help with targeting voters. (Ask your local Connect manager about how to do this, or if they don't know how to, get them to contact the Connect support team to be shown how.)

Your local DNO is legally appointed by the party to have the right to get this data on our behalf. Some EROs will, therefore, insist that the request for the list comes from the DNO rather than trusting that someone else is officially asking on behalf of the party.

Also, make sure you find out when postal voters (including postal proxies) are being sent out. EROs often will start sending these in batches right after the deadline for changing existing absent votes, so if you want to target people before they vote you need to know what is being sent out when.

Attending the postal vote opening

As the election agent, you are entitled to appoint postal voting agents to attend the opening of the postal votes. You may appoint yourself. There are usually a series of openings in the run-up to polling day and one on the day itself.

A condition of attending the postal count is that you may not divulge the result to anyone.

In a closely-fought seat, most agents are meticulous about attending or sending a suitably-qualified person. Others believe that they have better things to do in the immediate run-up to polling day. Attending is, though, an effective way of checking that there have been no major administrative problems, having an informal chat with key elections staff about how arrangements are working out, and getting a feel for how the votes are going.

You must decide on the basis of your own campaign demands and priorities which approach you take.

14. Canvassing

There are two purposes for canvassing:

- Gathering information about voters.
- Persuading people to change their minds.

Traditionally, the party has heavily concentrated just on using canvassing to gather data and making a virtue even of keeping conversations as short as possible. This is still often a good approach to canvassing, especially for newer and less experienced canvassers. However, increasing people prefer to take longer on the doorstep – especially as in many areas it is hard to find anyone in to begin with! – and to do more than simply get some data and move on.

You will need to decide what balance between these two approaches is right for your campaign and to ensure canvassing volunteers are appropriately briefed and trained.

Many party members believe that to go canvassing you need to know every detail of party policy. This is not the case and even when we are getting into longer conversations with voters, it is perfectly fine (and the public appreciate) a canvasser saying they will get the candidate to write back to them to answer a more complicated or obscure policy question.

Even if you concentrate simply on gathering data, make sure canvassers always ask not only for voting intention but also for an email address.

Many, many voters are willing to give us their email address, and this then provides a quick, easy and cheap way of keeping in touch with them further in future.

When asking for voting intention data, we don't want to come away simply thinking someone is 'undecided' as that does not help us target future messages effectively. Knowing which parties they might choose between (e.g. are they really hostile to Labour, or did they vote Ukip last time?) is much more valuable.

When we find a supporter, we should always follow up with an attempt to get them to help the campaign, such as by putting up a poster, delivering a few leaflets or joining the party.

Doorstep canvassing

As the job description above for canvassing officer covers, it is important to have the right set of materials put together in canvassing packs in order to get the most out of the time volunteers give up to go out on the doorstep.

You can have a large number of canvassing packs prepared in advance, and then just add in the canvass cards as necessary just before they get used.

Top tip: It is always a good idea to include on the calling leaflet given out when canvassing some type of survey/petition that people can fill in.

If people are out, then leaving the leaflet gives us a chance of getting data from them anyway.

If people are in, then asking them to fill it in then and there when you are on the doorstep is a great way of getting extra data from people and also gives an extra hook for a conversation.

Include feedback forms in each canvass pack so that after a canvassing session volunteers can record how it went, such as which issues came up most often, how the messages in our leaflets are working and whether there was any problem with the canvass packs.

Such forms are also a good example of how volunteers should always be being asked for their feedback during the campaign so that lessons can be learnt and organisation continuously improved.

If you have more experienced canvassers, you can also get them to gather other data when they are out and about, such as recording whether people with ambiguous names are male or female.

Surveying

If you have a very inexperienced team with very few canvassers you may find instant residents' surveys a suitable alternative option.

People who will not canvass will often be happy to help run a residents' survey

It is very important to run these surveys properly. Knock on the door and ask the householder to fill in the survey there and then. You then ask them to leave the completed survey sticking out of the letterbox for you to collect half an hour later.

You must go back for the forms – leave it a bit more than half an hour to make sure you get all the forms.

The response rate for returning these 'knock and drop' Survey forms can be as high as 90% from the people who you speak to.

Such surveys are very useful as:

- They provide information on local attitudes to local and national issues, making sure you are aware of local opinion.
- They provide leads for new helpers, members and poster sites.
- They provide information about the political sympathies of the households surveyed.
- They are good for gathering other information too, such as email addresses and mobile phone numbers.

Telephone canvassing

Telephone canvassing is extremely useful and effective. It is not a substitute for the personal doorstep call, but as a supplementary method of gathering information, it is invaluable especially as you can do it regardless of the weather.

Telephoning is also very good for targeting people who are geographically scattered, such as if you want to concentrate on canvassing people who were Lib Dem supporters at the last council elections.

Helpers who are unable to canvass on foot, such as due to mobility restrictions or childcare responsibilities, are often able and willing to make a few calls from their own home. Telephoning also provides a good physical break for the candidate and activists, such as by breaking up a long session of doorstep canvassing with some time sat down on the phones.

Some people prefer calling from home in their own time. Others find it more fun to come together as a group and make calls. Make sure you plan to cater for both types of volunteer. Group sessions are also really good ways to get new people involved: invite them to come and see how it is done, get some training and then making their first phone calls.

Many people have free minutes on their phone contracts which they can use for calling. Not everyone does, however, so it can be a good idea to buy in some cheap mobiles in order to have phones that anyone can use during group phone canvassing sessions.

Always provide a script. It is very easy to get tongue-tied on the phone.

It used to be widespread advice to dial 141 before making phone calls. However, changes to regulations mean that such 'anonymous' phone calls must now be avoided.

Thank everyone who helps, every time they help.

Telephoning is also a great way of helping your nearest target seat and the target seat should be willing to put on some training sessions for any new telephone canvassers you have.

With Connect it is easy to setup Virtual Phone Banks (VPBs), which provide telephone callers with the numbers to call, step them through the questions to ask and let them record the answers directly into the database.

Talk to your local Connect manager about getting phone numbers for voters in Connect: the party has several options for buying phone number which we are then legally permitted to use. In addition, phone numbers can be gathered for free during our campaigning by asking for them on surveys, when doorstep canvassing and so on. When getting phone numbers via printed or online forms, surveys or petitions, remember always to include the data protection text (given in the chapter on that).

Kitchen table canvassing

If you are the first real activist in your constituency and are wondering how to get things going, consider using this well-known but ancient technique during the campaign.

It is also particularly effective in large rural areas and can be used to open up derelict areas where the organisation has fallen apart – or black holes where nothing has ever happened.

Go and visit members in each area and take along the paper copy of the electoral register. Have a cup of tea and a chat and ask each member for names of people they think are sympathetic to the Lib Dems in the area. Then ask which of those people are the busiest – because paradoxically busiest people are often the most willing to help!

Follow up in person then with those people and offer them more information if they prove to be Lib Dem supporters. Ask if they can deliver a few leaflets during the campaign.

You may just have found your second activist – or at worst gained some basic canvass information.

This is no substitute for real canvassing, but if you are shorthanded can be a very useful technique to find extra help fast.

Late nights and Sundays

Make sure your campaign team does not lose votes by campaigning at inappropriate times. In most areas knocking on doors and delivery should stop by 9pm.

Clearly, campaigning can go on later on light summer evenings than in the dark of winter. You need to find out what local attitudes are. Do not assume that because you would not mind being called on at 10pm at night or 9am on a Sunday morning that no one else will mind either.

Elderly people are particularly sensitive to being disturbed in the evenings. Fear of crime makes it very unlikely that they will answer the door after dark. Even within one town, areas will vary as to when they will stop answering the door at night. In some areas, this might be as early as 7.30pm. In other areas, people will happily open the door up to 9.30pm.

What work can be done on a Sunday can vary tremendously from area to area. Delivery can be done from mid-morning onwards virtually anywhere. Canvassing is more sensitive. In many urban areas Sunday canvassing is acceptable, but in very rural areas Sunday afternoon canvassing can be counter-productive and is best avoided.

Think about the religious and age profile of the area. It may be better to get an extra leaflet out – or go and help a target seat that day instead!

Some candidates find that a gentle delivery round on a Sunday afternoon may go down very well in a rural area. They can chat to people who are in their gardens while stressing that they would not dream of canvassing on a Sunday.

Christmas Eve(!), Christmas Day, Boxing Day, New Year's Eve, New Year's Day, Good Friday and Easter Sunday are all very sensitive and should not be used for canvassing. Better to concentrate on clerical work or speech writing on those dates if you are not taking the day off yourself.

Other Bank Holidays are fine for canvassing and delivery as long as you do not start too early in the morning. Again, consider the population profile.

15. Freepost election address

The Royal Mail Freepost Election Address is a free delivery of item of literature that the Royal Mail will do to every voter for each candidate. We have to pay for the leaflets/letters, but the delivery of them is free.

This is a brilliant opportunity for any constituency to get its message across. Regardless of the state of your delivery network, you can deliver a message to every elector.

For the least winnable seats, it can be the centrepiece of the campaign. For target seats, it can give all the design quality of a Parliamentary by-election leaflet along with the flexibility of a targeted mailing.

Some basic decisions

Do you individually address it?

If you are going to put any kind of effort into your mailing then you risk something by not putting names and addresses on it. Here is a quote from an activist of ours who was doing some electrical work in a postal sorting office during a previous European election:

“The other parties’ election leaflets were delivered in piles to the sorting office, they weren’t addressed and the postmen just took armfuls out on their rounds with them. There was no real system for how they were distributed and at the end of the campaign, there were still piles of them on tops of shelves.

“When ours arrived it was quite different. They were all addressed so each postman knew which were his. Within four days they were all gone.”

Your sorting office may be the last word in efficiency, but why take the risk? Those aren’t the only problems you may encounter in not addressing your mailing.

Where constituency boundaries are not clear, or Royal Mail delivery teams have recently changed, unaddressed leaflets can get dropped in the wrong places. Royal Mail guidance itself states that unaddressed

communications will be delivered 'one to each delivery point'. This could mean just one to nurses' homes, barracks, and multi-occupation housing.

Addressing leaflets will involve more expense, time and effort. You can print labels or get a printer to mailmerge names and addresses directly onto the leaflets. You will also have to spend more time sorting the leaflets before handing them over to the Royal Mail.

However, if you have put a major effort into getting your Freepost written, designed and printed, it will pay you to address it.

An advantage of addressing the mailing is the fact that you can target individuals in households.

However, if you really cannot do the labelling or cannot afford to pay a printer, do an unaddressed Freepost, one to every delivery point. Get it delivered to the Royal Mail folded and in standard bundles or boxes by the printer.

How will you target it?

If you have taken the decision to address your mailing, you then have the opportunity to think about different messages and editions. (If it is unaddressed, you can only produce one leaflet and it must be the same for everyone.)

Most of the winning constituencies in the last general election did at least four Freepost leaflets. One mailing went to one named person in each household, and the others to the other named residents.

One or more of the 'leaflets' are often mailmerged letters in envelopes with inserts. This is a particularly good way of targeting different demographic and political groups within a household, e.g. sending a special young person's mailing, addressed just to the son/daughter in the household.

It is also standard practice now to produce the election addresses for postal voters separately. Getting them to the Royal Mail very early in the campaign means that they are delivered and read before postal voters cast their postal votes. This helps overcome the problem that otherwise postal voters often vote before they have received the final surge in literature from the Lib Dems.

Leaflets and letters can also be editionalised for different parts of the constituency. In constituencies with very distinct and different areas, each Freepost leaflet can be printed in several editions.

You could also design targeted election addresses based on the information you have stored on Connect (age, tenure, petition signers etc.).

A word of warning, however. There is no point in trying to do a very complex Freepost operation and then miss the deadline for delivery. If you produce multiple editions of your election address, each one has to be approved in advance by the Royal Mail.

Dealing with the Royal Mail

You should make contact with the relevant person who is looking after the Freepost for the Royal Mail as soon as possible if you have not already done so.

Ask them to send you a copy of the official Freepost regulations and discuss with them the details of the Freepost drop. Technically, these rules are applied in the same way right across the UK, but in practice there is often some variation, and, as so often in life, if you have a good working relationship with someone, you will find that matters go much more smoothly than if you are dealing with a stranger for the first time.

If you hit a problem with the Freepost, contact party HQ for help as they also deal with the Royal Mail nationally.

But the most important rule of all is:

Under no circumstances print your Freepost leaflet without getting it approved by the Royal Mail in writing or as an email.

Even if you have followed all the rules in the guidance, the Royal Mail may interpret them differently and you could find yourself hand-delivering the leaflet yourselves.

Be particularly careful about the size and how the leaflet is folded. Also, take care over the rule that the contents of the Freepost leaflet must be related to the election in question. In recent years the Royal Mail has become stricter about this, especially regarding bar charts.

Make sure you are clear how the Royal Mail want your mailing sorted for collection (in batches of 50, by post code area, etc.). Post-it notes tucked inside the rubber band are invaluable for labelling bundles.

Acquire loads of rubber bands – you will be amazed at how many you need – and they are very hard to find if you run out late at night!

Find out when they are prepared to accept the first batch of leaflets – and the latest time for them to accept a batch and still guarantee delivery.

Agree with the Royal Mail deadline/s for delivery of the mailing/s by their staff (most can usually guarantee to deliver within a week of receipt.)

Data protection

You may get data protection complaints from residents about receiving the Freepost election address from us. This standard reply, drafted by the Compliance Unit at Liberal Democrat HQ, covers the core legal points:

Thank you for your message of [XXX] May concerning the Data Protection Act.

The personal data referring to you that you have complained about does not belong to the Liberal Democrats but to the Local Authority in which you live. It is part of the Electoral Register each Local Authority is obliged by law to compile each October and to provide to candidates standing for election in your area under the Representation of the People Act 1983.

You may have opted out of the Public Electoral Register.

If so this version of the register is the one local authorities can sell for direct marketing purposes. You cannot opt out of the electoral purposes version of the Electoral Register given to Political Parties, or the one's given to the credit reference agencies and the jury service as it is an offence to fail to complete and return the Electoral Registration form. This means that your details have to be included in the versions given to given to Political Parties, the credit reference agencies and the jury service.

However, you are entitled to ask us not to contact you in ways that the ICO regards as direct marketing under the DPA 1998 and I have instructed that your record on our copy of the electoral register that we are provided with for electoral purposes is marked to prevent this happening in future.

There is one exemption to this the election leaflet that all candidates are entitled to have delivered to all electors on the electoral register in a Parliamentary election under section 91 of the Representation of the People Act 1983. According to the guidance issued to political parties by the Information Commissioners Office's prior to the 2010 General Election "Guidance for political parties and candidates – using traditional and modern marketing techniques for campaigning or promotional purposes" the following applies to such election leaflets "section 91 of the Representation of the People Act 1983 gives a candidate at a parliamentary election the right to send an election address by post. This specific right applies even if the individual has asked you not to contact them."

Of course, just because something is legal does not always mean it is wise, so you should try to exclude people who have asked not to be contacted by us from the Freepost election address. However, this legal explanation does mean it is ok to do an unaddressed Freepost leaflet which may result in the Royal Mail, therefore, delivering some leaflets to people who have opted out.

16. Digital campaigning

Online campaigning offers a blizzard of options and you will often find fellow activists polarised between those who get enthusiastic about every new possibility and those who think it is all of dubious value.

More electors use the internet than vote – so the internet is very important. But it compliments, rather than replaces, getting voters through their letterbox and on their doorstep.

The most important campaign tool is email. Make sure your campaign plans in gathering more email addresses from the public (such as via street stalls and asking when canvassing), and then also making good use of those email addresses (when messages are written well, voters are happy to get emails up to even every few days from the party).

The second most important tool is Facebook because it is so popular with voters. Make sure either the local party or the candidate has a Facebook page, regularly publicise the page and regularly post content to it.

There are several advantages of having a page over using a personal profile, of which the most important is that it lets you separate off the public, campaigning use of Facebook from the candidate's personal use of Facebook, such as sharing of family photographs with their friends. Another useful advantage is that with a page you get much more detailed statistics about how it is performing, so there is much more scope to track what is and isn't working and learn from that.

The third most important tool is Twitter because it is very popular with the media and with many party activists. Remember, however, that every tweet the candidate sends is public – and so must be thought about carefully before being sent.

It is also sensible to have a good web presence. That comes fourth in the list as more candidate websites (or pages on a local party website) get little attention compared to the possibilities of email, Facebook and Twitter. Having some good information about the candidate added to the local party website is a good minimum. Think carefully about the pros and cons of putting time into developing a more complicated and advanced website presence compared with developing email and social media more. For some campaigns, it does make sense to do this, but often campaigns put too much effort into their website and neglect email.

Both NationBuilder and Prater Raines are widely used by local parties and provide a website, email and some social media services in one integrated

package for reasonable costs. Also very popular for email is MailChimp, which is free for smaller sized lists. Another advantage of these suppliers is that, as they are all widely used in the party, there are also lots of colleagues around who can provide help and advice.

WhatsApp is becoming increasingly popular as a simple group message system for letting activists keep in touch. For example, if all your main canvassers are on a WhatsApp group then it is really easy to let them know just before a canvass session starts that the plans have changed due to rain and instead which house to meet at for some phoning.

The Lib Dem Digital Campaigning Forum group on Facebook is a great source of advice and support.

Resharing messages of support

Resharing on social media messages of support from voters is a good way of building momentum for a campaign and encouraging other people to add their support too.

However, care must be taken about messages from people who have said they have cast a vote (i.e. not just talking about how they will vote but about how they have voted, such as an early postal voter).

This is because there is a ban on publishing exit polls before the close of polls on polling day. The ban goes wider than conventional opinion polling as it covers “any statement relating to the way in which voters have voted at the election where that statement is (or might reasonably be taken to be) based on information given by voters after they have voted”.⁵

So a tweet saying, “Great to have seen five postal voters say they have voted for me!” would be illegal. Resharing (e.g. retweeting) messages from voters about having voted a particular way is also best avoided as it may well count as “publication” and so fall foul of this law. (This legal point has yet to be tested in court but there being the test case would be expensive and unwelcome.)

However, it is fine to reshare comments from people saying they are going to vote Liberal Democrat. It is also fine for a voter – including party members – themselves to say how they have voted. It is only reporting on how others have voted that is a problem.

⁵ Representation of the People Act 1983, Section 66A.

These messages from voters saying how they have voted can include photos of their ballot papers. Do not, however, encourage supporters to share photos of their marked ballot papers as this too would be against the law due to the ban on inducing voters to display their ballot papers showing who they have voted for.⁶

Polling station selfies

Voters sharing photos of themselves voting started to become a trend in Britain during the 2010-15 Parliament, copying the idea from other countries. In Britain the legal situation is complicated, and as the Electoral Commission advice to electoral administrators explains:

“The law relating to obtaining information in polling stations and disclosing such information is complex. Given the risk that someone taking a photo inside a polling station may be in breach of the law, whether intentionally or not, our advice is that you should not allow photos to be taken inside polling stations.”⁷

⁶ Representation of the People Act 1983, Section 66(3)(d).

⁷ Electoral Administration Bulletin, Issue 74 (England and Wales edition), 29 April 2014. The legal issues are the same in Scotland.

17. Candidate's programme

There are many ways of filling up a candidate's time. Here are some of the main options to consider when putting together their diary. For smaller campaigns, it may be a matter of picking only a few items from this menu – but every campaign should include number one.

Recruiting and motivating volunteers

The best person to ask others to help on a candidate's campaign is always the candidate themselves.

Candidates are often tempted to spend too much time doing campaigning directly themselves rather than recruiting more people to help. This may be because they are a little shy of asking or because they think going out and spending 8 hours delivering is what a hard-working candidate does. The truth, however, is that it is what an inefficient candidate does. Their time should always prioritise getting other people to join the team and motivating existing team members to do more.

Canvassing

This is an effective way of getting the candidate out and about but not always the best use of their time. Remember to use other techniques as well, which give a higher voter contact rate.

In a rural constituency, the candidate should have at least one canvass session in each large village during the campaign.

Candidates should never canvass on their own.

There should be at least the candidate's aide and ideally one or two others. Team canvassing is best where the aide carries the canvass cards and the candidate is then introduced to supporters by the team members as they are identified.

Candidate canvassing is seldom accurate as people are reluctant to tell a candidate to their face they will not be supporting them. It is, however, a good way of making a strong impact on the voters.

Public meetings

Many get very small attendances, so it is usually best to restrict public meeting appearances to those put on by other organisations with a good track record of pulling in the numbers or where all the candidates will be appearing.

It is only rarely worth organising a public meeting ourselves. But where a public debate is organised and we can benefit from the audience someone else has put together, that is good. Moreover, bad publicity can result if the candidate is seen to duck debates like this.

Before agreeing to take part in a media debate, check that the meeting is to be chaired by a respected local figure you are confident will be impartial. Refusal by one candidate to appear does not now prevent the meeting going ahead, however.

Make sure your candidate does their homework before a public debate. They must read all the day's papers and be familiar with the kind of questions being raised about our campaign. Answers for these should be thought through in detail and then practised. Likewise, Lib Dem policy should be clear in the candidate's mind – even under stress!

Walkabouts

These are often one of the best uses of the candidate's time. The level of voter contact is high, with many passers-by seeing the candidate talking to other voters in a busy shopping street.

A successful walkabout needs the candidate, aide and preferably two other helpers. The task of the helpers is to approach passers-by and find out if they are supporters or potential supporters. Potential or present supporters should then be asked if they would like to meet the candidate. If the answer is yes, the helper should introduce them to the candidate and then move off to find other supporters.

Supporters should also be offered lapel stickers and posters. Their children should be offered a balloon. (Tie a loop at the bottom of string for little kids to hang onto safely, without losing their balloon).

Equipment needed for a walkabout includes:

- Rosettes for team members
- Lapel stickers
- Balloons – helium-inflated on string
- Diamond window posters
- Diamond car stickers
- Casework notebook plus pen

- Canvass leaflet or A5 Flyer
- Petition forms on a clipboard
- Recruitment leaflets

On a rainy day, you may be able to get permission to walk about in a shopping centre – they may agree, but impose conditions such as a limited number of people in the team and no flyers handed out (litter problem). You may be able to negotiate, such as by promising to do a litter sweep afterwards.

Street stall

This is another good high-profile activity. You need a reason for having the stall, such as collecting petition signatures.

Common sense will tell you which are the good sites. You do not want to block the pavement or force anyone to step into the road to get round people stopped at the table.

Make sure you have permission to set up your stall in the street. Find out from the local council what by-law restrictions apply. You may get permission from a shop which owns its own pavement. The clue here is if there are two different areas of paving outside a shop – with one closer to the shop premises. This could indicate they own part of the pavement and may be prepared to let you use it as long as you do not get in the way and stop customers entering the shop. Sometimes there are studs in the pavement showing the demarcation line.

You will need all the same equipment needed for a walkabout, plus material for decorating the stall.

Day centre visits

Most areas will have day centres where elderly people can get a good meal and spend time in a warm friendly atmosphere.

It is vital to arrange visits to day centres well in advance. Only the candidate and possibly the aide should go in. A troop of people will look very bad.

These visits should be early in the campaign as some of the people there will have postal votes. Also, take a batch of postal and proxy vote applications with you.

Residential homes

Most of the same points on a visit to a day centre apply to a residential home.

Try to find out from the warden a bit about the kind of place it is. Some residential homes are really nursing homes with many confused and disorientated residents who might be distressed by a visit. Others have residents who are in full possession of all their faculties who will welcome the opportunity to meet the candidate.

Find out from your candidate how comfortable they are with visiting the different types of homes. A male candidate is advised to have at least one woman in his team and vice versa.

Take forms for postal and proxy votes on these visits.

Some wardens are committed to another party and will try to block our access to the residents. There is little you can do to get around this problem, other than making sure you send individually addressed copies of at least one leaflet to each resident.

School gates

Meeting parents outside school gates needs to be handled with a certain amount of caution. Avoid any situation where you get between parent and child. Don't distract a parent whose toddler runs off into the distance as you are talking to them.

There are two ways of managing this:

- In the morning speak to parents after their child has gone into school. Watch out for the toddler running into the road problem.
- In the afternoon, arrive 20 minutes before school turns out. Talk to parents waiting for their children. Then leave as soon as the first kid comes out of school.

In either case, a male candidate should be escorted by a female aide. Two men hanging around school gates can cause a misunderstanding. Best of all, have a local parent, who is a member or supporter, on hand to introduce your candidate to other parents.

School visits

Think hard about what you want to get out of visiting a school. If it is a fact-finding tour, it is probably best done before the campaign begins. If it is a photo opportunity, make sure the head teacher is sympathetic and will allow the media in – many will not. Check all kids and their parents in

the photos are happy to be included and give permission to use the photos – and that kids are not the children of prominent opposition activists.

Launching a document such as a 'Report on Schools in the Area' will get much better press coverage if it is done in a school with kids available for photos. The head teacher will then also be able to put their views forward to the press.

Going along to the school to talk to the Sixth Form is very worthwhile – and challenging! They will ask the most difficult questions put to the candidate throughout the campaign. A weak candidate will be exposed very quickly.

Again the candidate should only be accompanied by one other person – usually their aide.

Factory visits

This can be immensely useful and interesting. The candidate can gain a great deal of understanding of the situation in the industry locally by careful questioning of managers and workforce in a factory – big or small.

If the factory is a large one, with shift work, the candidate can stand outside the gates and glad-hand as a shift leaves. However, most people are keen to get home. Helpers handing out fliers is probably a better bet than the candidate standing around, being ignored by tired workers rushing off home to bed.

Royal Mail sorting office

Visiting the postal workers in the early morning is a good opportunity to see just how that election address Freepost is going to get delivered. Few candidates bother to do this. It is well worth the effort.

Railway stations

Getting up early to hand out leaflets or survey forms, and to greet rail commuters, is another early morning occupation which can pay dividends.

Posters and stickers can be handed out, as well as a survey to be completed on the journey. This is handed to a helper outside the station at the end of their return journey in the evening, returned to a Freepost address or completed online.

Village visits

In rural constituencies, small villages are frequently left out at election time. Send the candidate to visit every village once during the campaign. He/she should drop into either the village shop or pub or meet parents outside the school.

In the shop or pub, the candidate should introduce him/herself to the owner and ask how business is going. The visit needs only last 10 minutes or so. Programme in about 20 minutes minimum, taking into account car parking, walking up the path, etc.

Word will spread very quickly that our candidate has been in the village.

If there is no shop or pub, canvass the central block of village houses, preferably with a team of up to 8 people. This is one occasion when a large group is an asset.

In some areas, it is traditional to announce the candidate will visit later in the day on a loudspeaker. Make sure the loudspeaker is not used while the vehicle is on the move – otherwise no-one will have any idea what has been said. Do not use the loudspeaker if you can avoid it. It always annoys someone.

Pub visits

Calling in on local pubs for lunch and at the end of a day's campaigning can work very well. The candidate should introduce themselves to the landlord or landlady and the staff.

The candidate should not drink alcohol at all at lunchtime. Beer or spirit fumes do not make a good impression. If the team stops off at a pub at the end of the day's activities it is fine for the candidate to have a pint of beer or a spirit, such as a gin and tonic. Any more should be avoided in case some of the political opposition happen to come in. Accusations of drunken behaviour could follow.

By careful planning, a fair number of pubs can be visited during the course of the campaign.

Fetes, fairs and concerts

There are some small events that are well worth visiting during the campaign – in a lower profile manner. A local person primed to introduce the candidate around is an asset.

It is often wise to leave the rosettes off at this kind of event. High profile razzmatazz will offend as it will be seen as an attempted takeover.

As a rule of thumb, the smaller the event, the less show the candidate should be seen to make.

If it is an event very local to the candidate's home or a community she knows well, getting stuck in and helping the organisers is often the best approach for her to take - and it will be appreciated.

House parties

House parties are becoming a very effective and widely used campaign tool. Find a supporter or member in each area willing to invite neighbours round to meet our candidate. This can be at any time of day. Charge a nominal sum for coffee and tea to avoid a charge of treating.

The candidate then circulates and talks to everyone individually before saying a very few words (no more than 4 minutes) about the election and leaving for their next appointment – while the house party continues.

It is wise to have one or two members who stay after the candidate has left, to steer the conversation in a positive direction and to solicit any further offers of help for the campaign.

Clearly, this kind of meeting is most effective when you have a charming and articulate candidate.

Hospitals

As with schools, it is important to decide what you want to get out of a hospital visit. Do you want the candidate to talk to the management, the medical staff or the patients? Do you want to find out particular information? Will there be a photo opportunity?

You must arrange hospital visits in detail. The candidate must arrive on time – and leave on time.

Find out if your candidate is comfortable around sick people and in the hospital environment. Many people are not. A pale green candidate who passes out during the visit will make few converts.

Remember to follow any hygiene requirements, e.g. washing hands on entry to a ward, or not wearing ties or scarves, very closely.

Playgroups

The same considerations apply here as to school visits. However, playgroups are one of the best opportunities for a good photo opportunity

with a visiting VIP. Make sure your candidate likes kids and is comfortable around them.

Get permission from both staff **and** parents to use the photos.

Emergency services

These are all great for a photo op – particularly in unsocial hours! Visiting the fire station night watch or sharing a hot cup of cocoa with an ambulance crew who have just come off duty.

Getting permission to visit a police station is often difficult without a VIP, but will depend on your local force.

Going out on patrol with the local police at night is a great way of learning more about the local area and the challenges the police are facing. However, it must be arranged with plenty of notice.

Supermarkets

Ask if you can take the candidate to meet shoppers or collect petition signatures in the car park. Tricky to get permission, but they do sometimes say yes. It very often depends on whether they have a group policy or if it is down to the local manager.

Local out of town superstores are often more relaxed about letting you collect signatures for a petition, or meeting and greeting shoppers.

Phone calling session

Having the candidate join a group of helpers for a phone canvassing session is a great morale fillip often – both for the helpers and for the candidate, who gets to spend the time surrounded by supporters who are giving up their time to help them. As mentioned in other places in this manual, phoning voters is now a major part of most constituency campaigns

Trip to help a target seat

Not only is the candidate another pair of hands to help a target seat, having them go is an important act of leadership to show that the campaign is sensibly balancing local efforts with making a difference where an MP can be elected this time.

Maximise the impact

None of the above should be regarded solely as 'something to keep the candidate occupied'. Each one provides an opportunity for the candidate to learn more about their constituency and the conditions local people are living in.

If it is a photo op, do not let the candidate rush off as soon as the photographers have finished. Nor should the candidate be doing all the talking. They should stay, listen and learn.

Remember to follow up properly on the visit – thanking those who were met or helped organise it, issuing a news release as appropriate and making use of email/social networking/websites to publicise the visits.

18. Media work

In theory, the easiest way to get publicity for your campaign is through the media. It has the added advantage of being free.

You are fairly certain to receive two types of coverage in each local newspaper during the campaign. The first is a two or three hundred word biography and head and shoulders photograph, at the beginning of the campaign.

The second is a two or three hundred word statement of what your candidate stands for. This is usually published towards the end of the campaign.

The biography content is fairly self-evident. If you have space, it is a good idea to include a statement of why your candidate wants to be the local MP.

Avoid a lot of stodgy policy which most people will not read: concentrate on talking in normal language about what matters to non-political obsessives.

Both these pieces can be written in advance and checked for relevance at the time of going to press.

Press packs and photos

You will need to send press packs out to all media. This consists of the candidate's biography and a couple of their head and shoulders photos. Usually, this will be done via email with the photos (at good resolution) attached.

You can try seeing if your local papers, particularly the freebies, will accept action photographs you have taken. If they will, you have a considerable opportunity. A story plus photo is much more likely to get printed than a story alone. If you have a good quality digital camera, you can email photos to the local papers. First, check if they are happy to receive photos this way – but if they are, it can greatly increase your chance of getting photos published.

Remember the camera must be set to take a high-quality photo, otherwise, it may not be of sufficient quality for the newspaper to print it. Few smartphones take good enough photos for newspapers to use. If

necessary, check with the paper what they require in order to use a photo.

Think carefully about what message you want a photo to convey. The candidate should be on their own in a head and shoulders shot for press use. But in action shots, you don't want them to look like a lonely person in the far distance. Make sure the candidate is photographed with other people and that the photographer gets in close.

Crowd shots with supporters to show that many local people are backing a candidate or particular campaign are very popular. A good tip is to have supporters holding signs with very short slogans on them which reinforce the message.

Regular press releases

How much your regular press releases get picked up during the campaign will depend, to a certain extent, on how often you have got coverage before the election. If you know what type of story your local press are looking for, you are way ahead of the game.

The best way of getting local coverage is to find a local angle on a national story. If the big national story is about pensions being too low, find a local example of an elderly person who is having trouble making ends meet.

Even so, be cautious:

- Always check, and double check your facts.
- Never use the name of a member of the public without their permission.

You can get a regular supply of national story ideas that can be adapted for local use from the party's website, www.LibDems.org.uk.

Going off the record

If a controversial story breaks, locally or nationally, a reporter may ask you to 'go off the record'. They will imply that anything said off the record will remain private. Don't believe a word of it. If you give a red hot story 'off the record' be prepared to see it in the media the next day

After all, it is their job to get the news – and your job is to make sure it is the story putting our campaign in the best possible light.

Letters

The letters page is often the best-read part of a newspaper, so do not forget to make use of this publicity opportunity and encourage your members and supporters to write in. Often newspapers have online comments on their websites, which is another avenue that should not be neglected especially as journalists often read the comments on their own stories.

Just a quick comment

A journalist rings asking for an instant comment on the phone and...

Never, never, never comment off the top of your head.

Politely ask what the deadline is and say you will ring back in 3, 10 or 20 minutes, whatever is appropriate, with the comment. At the very least that gives you the chance to write the answer out on paper – and check with colleagues if the question is about a national issue or a particular councillor's area.

If you are commenting on behalf of the candidate you must clear the comment with them first.

Never lie to the media

You can be sure they will find you out. But do not rush to confide in them either.

If you have nothing to say, say nothing – not even 'no comment'!

If you say no comment, that allows the newspaper to go to print because, in fact, you have just responded to the reporter's question!

Avoid talking to reporters altogether if you are in trouble – turn on your answerphone and screen calls before picking up the handset– and call for help from your region/state party or Liberal Democrat HQ ASAP. Then you can decide what to say and get back to the reporter.

The tabloid press is on the phone...

These are words which strike fear into the heart of even the most experienced agent. What if it happens to you? Remember these three steps:

- Stay polite: no matter what insulting story you have just been asked to comment on.
- Get them to repeat the question. Write it down.
- Say you will call them back. Then get on the phone to your candidate or LDHQ for any background briefing. Then decide what your comment will be.

Roughly speaking, these calls come in two forms. One is asking about the national party, the second about your candidate's personal life or that of a key team member.

If they are chasing a national story it may be a fishing expedition. They may be trying to flush out a story they think exists – but are not quite sure. Get advice quickly, before responding. Never assume that the question you are being asked is based on fact.

The reporter may try to panic you into a response by saying they are publishing tonight or tomorrow (or the day after!) so they need your side of the story now – otherwise your point of view will not be given. Do not be pushed into a comment. Wait to get advice.

The press must give you the opportunity to comment before they publish. If you do not comment, their lawyers may not want to risk publishing.

19. Poster campaign

Posters play a key role because they show voters that ordinary people, including their neighbours, support us. It raises the morale of your own activists and conversely depresses the opposition.

As a basic campaign, make sure that all members, helpers and previous poster sites get a window poster to put up during the campaign. How far beyond that you go depends on your resources and prospects of winning.

Poster shape and size

The design of the poster should be simple. Remember that most people will only very briefly glance at an election poster, and may well see posters from more than one constituency – such as when commuting – so consistently using the standard party shape, size and colours.

Use the generic diamond design with the party logo – even if local elections are on the same day. The diamond will be seen and recognised right across the country.

The sizes commonly used are:

- 5 x 5-inch posters – car stickers
- 10 x 10-inch posters – window bills
- 15 x 15-inch posters – stake boards
- 36 x 36-inch posters – super signs

Most campaigns use stakeboard and super-signs made of Correx and which can be reused across multiple campaigns. This both saves money and also means only a portion of their cost need count against election expense limits.

Poster colour

Voters see posters in different constituencies as they travel to work, shop etc. Therefore, a consistent appearance of posters, using the party's standard orange everyone.

Tip: under no circumstances order 'Dayglo range Orange', because this colour is nearer red than orange.

Pre-campaign preparation

Work out how many stakeboards you think will get up in the course of the election campaign. As a rule of thumb urban constituencies need fewer

stake boards than rural constituencies. Farmers' fields take up large numbers of stakes.

Shop around amongst the timber merchants and get the best quote for 1 inch 1/2 by 1 inch 1/2 with a point. You will need lengths between 5' and 8'.

If you are not using Correx posters, you will also need hardboard to glue paper posters to. Once again, shop around for the best price. Try asking for a discount on a bulk order. Sheets of hardboard come in four foot by eight-foot sheets. Use the 4 mm type.

You need two hardboard diamonds on each stake board. You can get 18 hardboard diamonds from a single 4 x 8 sheet. These diamonds should be 16 inches by 16 inches.

All these materials should be delivered to the poster teams workshop. This can just be someone's garage, which will be the poster team's workshop and storage area for the duration of the campaign.

Remember wood is expensive and can easily blow your entire expenses limit. Therefore, the local party should buy the wood, not you, and you can then hire the stakeboards at a sensible sum and declare this in your expense returns against your expenses limit. Stakeboards that are well looked after and stored in the dry are reusable for many years, for many different events and elections. Hence, a reasonable rental fee for use in one election is much lower than their purchase cost.

You will need to factor into the rental fee an allowance for wear and tear on the stakeboards, including the possible loss of some to bad weather or vandals.

Pasting up

Pasting up needs to be done well enough in advance. Paper posters should be stuck to the hardboard squares and allowed to dry properly before being put up.

The mixture should be wallpaper paste (which has fungicide already in it) that is made up to the instructions for applying heavy wallpaper, then add roughly 1 1/3 of a made-up mixture of hot water size. Mix these two together thoroughly.

Do not make up too much of this mixture – it goes a long way and it lasts a long time after making it up.

Other material

- A box of 1 1/4 inch galvanised clot nails.
- A box of 6-inch round head wire nails.
- Two claw hammers.
- One 10lb sledgehammer in the back of the van.
- One reel of 12 gauge straining wire.
- A pair of pliers.
- A step ladder – which does not wobble.
- A first aid kit for minor cuts.
- An old towel may prove useful.
- Leaflets saying 'Thank you for displaying a stakeboard'.
- Calling leaflets which ask people to call a certain number to get a stakeboard in their garden.

The more people who have agreed to have stakeboards and signed a permission form before the campaign the better.

Concentrate on getting these for main roads and roundabouts first.

The team

The average poster team should be two people – one driver and one navigator. It goes without saying that they should be able to get on well together. They will need a big, detailed map of the constituency. Sat Nav can be handy, but particularly in rural areas a bit of human map reading and intelligence is still necessary.

In large rural constituencies or places with many poster sites identified, you may well need more than one poster team.

The poster officer oversees the team and of maintaining records of poster sites. It is vital that these records are kept in good order for reference in later campaigns.

Poster strategy

The first week of the campaign you should concentrate on getting poster sites on main roads, and areas where a large number of people congregate.

You should also target third party squeeze areas. Do not forget strong Liberal Democrat areas altogether but keep a wary eye on whether the opposition is trying to make headway in them.

Your first week has gone well and large numbers of posters have gone up all around the constituency. The weekend arrives and half of these stake boards are vandalised or stolen. Under no circumstances retaliate. The chances are that it is either drunks coming out of the pubs or children up to no good.

If political rivals take down posters, then they want you to over-react. The police are generally not particularly interested in this crime. Any complaint that you must make should be addressed to the Chief Constable. The press will not take much interest unless someone gets caught.

If you replace posters just as quickly as they come down, then most vandals or thieves get discouraged by your perseverance.

Best poster sites

Sites on main roads, by railway stations or close to major roundabouts are particularly good. Good rural poster sites often depend on an early approach to farmers. Approach farmers to ask if you can put posters in their field – do not ask how they will vote.

Fun sites are next door to the Labour or Tory HQ, and more useful sites are next door to polling stations.

There is no law to stop a person putting a poster in their own garden even if it is next door to the polling station.

Specialist canvassing for posters can be invaluable. This is a job that needs to be done by a confident canvasser of proven ability. If the constituency is rural then this specialist should cultivate contacts with the farming community.

Flyposting

Flyposting is putting up posters without permission on trees, lampposts, roadside verges or anywhere else where you don't have permission.

Don't do it. You could end up in court or face a massive bill for use of said tree, telegraph pole or fence. On top of that, you could face legal penalties under local by-laws.

In the recent past, there were areas where by-laws allow posters on lampposts and roadside verges, e.g. some areas in the Midlands and parts of Scotland. However many if not most of these local by-laws have changed recently and it is no longer allowed. Read the local rules carefully and check with your ERO and the local council. Make sure you have a good poster display if you discover you are in an area where this is still allowed.

A good poster display is vital to show we are real contenders.

20. Imprints

Introduction to imprints

All literature, including leaflets, target letters, posters, websites and emails must carry an imprint. The purpose is to enable the reader to identify who is legally responsible for the item and how to contact them.

There are also regulatory requirements around marketing which can require us to make it clear that marketing items are from us. Follow the party's imprint advice as set out here and you will be covered on that front too.

Target, casework and personal letters need imprints, even if there is an address at the top of them.

Remember to put an imprint on 'internal' communications such as members newsletters, appeal letters, etc. Our members may have hostile relatives and friends who may see them, and anyway, the law requires the imprint to be on materials even if they are only seen by party members.

There are both legal requirements for an imprint outside of election time and during an election.

If it is your name on the imprint as agent, you are accepting legal responsibility for the content – which is why it is important that you see all literature before it is printed or, in the case of electronic literature, is published or sent out.

Imprints outside of elections

Outside of elections, the requirement is set down by the Newspapers, Printers and Reading Rooms Repeal Act 1869, i.e. you give a printer and a publisher. The standard wording to use is:

***Printed by [name of printer, address of printer]. Published by
[name of publisher, e.g. local party, address of publisher].***

Imprints during elections

During elections, the use of imprints is covered by election law and there are additional requirements, both on the wording and location of the imprint.

The standard wording to use is:

Printed by [name of printer, address of printer]. Published and promoted by [name of agent] on behalf of [name of candidate] (Liberal Democrats), both at [office address used in appointment of election agent form].

'Liberal Democrats' should be used in full as this is the registered party name that can be used, via the register of political parties, to track us down. In Scotland and Wales, you may wish to use the Scottish and Welsh name of the party in the imprint in addition to, or instead of, the English version.

The abbreviation 'P, P & P' will not do.

It is acceptable to use a printing firm that sub-contracts some of its business to other firms or offices. For the purposes of the imprint and the election expenses, the printer is whoever you arranged the printing with. In other words, the printer is the print firm or individual from whom you ordered the printing, who sends you the invoice and who the payment is made to.

Imprints can be in a very small font size, providing they are legible. Pick your font carefully as often a clear font is readable at much smaller sizes than other fonts. Do not use small italics as this is less readable.

If you have multiple candidates who need mentioning, e.g. on a county-wide newspaper, and it is not feasible to list them all by name, use the following wording:

Printed by [name of printer, address of printer]. Published and promoted by [name of agent] on behalf of the Liberal Democrats, all at [office address used in appointment of election agent form].

If you have a general election and council elections on the same day, there may also be multiple agents covering multiple candidates. In such a situation the 'agent' named should be the one person agreed by the other agents to publish the leaflet on their behalf.

Do not just copy the imprint from the previous piece of literature.

Always check each time that the imprint is correct. Many imprint problems arise from copying the imprint from one leaflet to another to another, to another, over the months, with mistakes starting to creep in if the wording was not checked each time. By the end of it, you can easily have an imprint that is seriously wrong.

Remember to put the imprint in the right place.

The imprint should appear on either the first or last page or, for a document consisting of (or consisting principally of) a single side of printed matter, on the face (printed side). So, on a four-page newspaper, the imprint should be on page 1 or page 4.

An easy way to make sure everything is correct is to ask yourself if the imprint is on the outside of the leaflet. Don't worry too much about how the leaflet is folded before delivery. You can't really be held responsible if a deliverer decides to turn a FOCUS leaflet into an origami elephant and the imprint ends up halfway up the inside of the trunk! But if a leaflet is clearly designed to be folded in half, then the position of the imprint should reflect this.

If part of your leaflet is designed as a poster, then that part which is to be displayed must have an imprint on it too.

If part of the leaflet is designed to be cut off, for example, a reply slip, you should ensure that full contact details are on both parts. Often this is most easily done by having an imprint on both the slip and the area left behind if the slip is cut off

Imprints and national literature

Some material during an election campaign may count against national, rather than local, election expense limits and therefore should include a national element in the imprint too. Liberal Democrat HQ can advise on the appropriate wording to use when there are any agreements to allow national items to go out in a particular area.

Old imprints

The imprint of another individual may still be legal, providing it is accurate and the person named can still be contacted at the address shown and is willing to accept the responsibility.

This is very useful if you are reusing material from a previous election, such as posters. Make sure however that the named person and the address are both still valid – and that the agent is still alive, willing to be contacted and a supporter.

If you run into that problem, a new imprint must be added. This may be done by hand, rubber stamp or by photocopying. To cover these kinds of eventualities, it is a good investment to buy a rubber stamp. You can get one made up with your own imprint or buy one which works like the old John Bull printing sets- you can get a similar kit from Amazon for around £10.

Similarly, if you have the right peacetime imprint on literature then if some of it ends up being delivered during an election, that is fine.

Imprints and the internet

Websites and emails also need a full imprint and should include a contact phone number to help cover other relevant regulations about online communications.

The printer is the company hosting ('printing') the website. For emails, the printer is the firm whose mail servers are used to send the email. The word 'printed' must be used in these cases, but you can also add the word 'hosted' e.g. 'Printed (hosted) by ...'

Emails should also include information on how to stop receiving future emails, for example:

The small print: If you would rather not receive such messages in the future, please let me know. Published and promoted by [agent] on behalf of [candidate], both at [office address], [phone number]. Printed (despatched) by [ISP name and address].

This will cover you for election law, good practice and also the relevant regulatory standards, for example, related to sending emails.

Where it is not feasible to include an imprint (e.g. in the text of an individual tweet), an imprint or a link to a page containing an imprint should be included in the bio on the social media profile used. For example, a Twitter bio can include a link to a website whilst a Facebook page can include an imprint in the information about the page.

21. Data protection

Liberal Democrat HQ has recently changed the data protection text which must be used whenever data is gathered, such as on surveys, petition slips and feedback forms:

The Liberal Democrats and their elected representatives may use the information you've given to contact you. By providing your data to us, you are consenting to us making contact with you in the future by mail, email, telephone, text, website and apps, even though you may be registered with the Telephone Preference Service. You can always opt out of communications at any time by contacting us or visiting www.libdems.org.uk/optout. For more information go to www.libdems.org.uk/privacy.

This wording must be placed in close proximity to where the data is asked for.

Petitions

Remember that with a petition, you are going to also hand the petition signatures over to whoever the petition is addressed to. You should therefore also make this clear on the petition form.

If you are gathering information on which party people support, you should remove this information before submitting the petition itself as this information is not necessary for the petition's submission and people may (rightly) want to keep such information about themselves more private.

That is something it is important to remember when artworking the petition form itself.

Record opt-outs

If someone contacts you asking to be removed from future contacts, you must do this and should confirm to them that it has been done.

Make sure you record all opt-outs in Connect. It is important to record them here because otherwise there is a real risk that the person will be contacted again by a future campaign, such as regionally organised activity in the next elections which involve list PR.

Questions to candidates at election time

One particular area that needs care are the unsolicited questions, usually by email, sent to candidates at election time.

Data protection rules allow you to respond to them, and you can follow up with more than one message on the topic. It is also possible (and beneficial) to ask such people if they are happy to receive messages on other topics from the Liberal Democrats too.

If they are, their data can be entered in Connect and you can include them alongside other voters in future mailings. This is a very helpful source of data for most campaigns.

It is very strongly advisable to enter their data in Connect as one requirement of data protection rules is that we take good care to keep our data about people up-to-date. If you do not add their data to Connect (and then subsequently use it from there), the risk of failing to update data properly is much higher as you can't easily coordinate information from canvassing, direct mail, email replies etc. to make sure that the information about any one person is all correct and up-to-date.

Remember that your first response must always be an answer to the unsolicited question.

As with emails sent on other occasions, make sure that all the emails sent out include an unsubscribe option.

22. Libel, defamation and other legal matters

Libel and defamation

Much as we may want to go on the attack in our literature, be cautious about the legal implications.

- Attacking the policies of other parties is fair game.
- Attacking the policies of your opponents is fine, but make sure you've got your facts right; for example don't accuse them of expounding fascist views if you can't prove it.
- Attacking the attendance record, voting record or stance on issues can be fine – but check your facts. Make sure you have accurate documentary evidence to back you up – remember that mistakes are sometimes made in the press and in official records. Make sure also that there is not a good explanation, e.g. someone missed a vital vote because their child had just been rushed to the hospital.
- Attacks on your opponents on a personal level are very dangerous: steer away from remarks about their personal behaviour, love life, etc. If in doubt, please check it first with an expert.

Remember – libel cases can cause considerable embarrassment and expense to the party and to you.

For more details, see the ALDC Election Law handbook – and remember that quoting the media is not a defence in itself. If the media story is wrong, you can be liable for repeating it and it can be very costly.

The appendixes to this manual contain a simple flowchart which sets out who to contact in the party for help if you are on the receiving end of a legal threat. If you do find yourself in this situation, follow the process in there immediately.

Copyright

Just because a photograph is available online, it does not mean you are free to reuse it in leaflets. Take care to check the permissions on the photo before using it and also take care over photos which feature children. The ALDC Election Law Handbook has more on this, including a recommended form to confirm permission to use a photo featuring children (see appendix 9 of the Election Law Handbook).

A good source for general party photos is the Lib Dem Flickr account, www.flickr.com/photos/libdems - but remember to check the copyright on a photo before using.

If you are registered with the Compliance Office as the election agent for your constituency, you will be given access to the Google Drive where more party photos are stored along with useful leaflet templates.

Do not reproduce photographs, illustrations and cartoons from newspapers or magazines without first obtaining permission. There is likely to be a need to credit the source, and possibly also a fee to pay.

However, you can quote extracts. The House of Lords ruled it is not a breach of copyright to circulate a single story from a newspaper, and shorter extracts are even safer. Remember always to acknowledge the source.

You are also probably safe reproducing a newspaper front page in full as long as it is old enough that there is no argument that reproducing it deprives someone of earnings. This is key to the 'fair use' defence for copyright – which is both very useful and also at times frustratingly vague.

The key parts of this are:

1. Not depriving someone else of their rightful earnings. Hence a short extract is fine.
2. Not passing off someone else's work as your own.
3. Having permission before earning money from someone else's work.

Do not reproduce official logos of companies, institutions, local authorities, and so on. This is usually a breach of copyright and can be taken to imply that the organisation endorses your views, and it could get you sued.

Advertisements

If you usually fund your literature by selling advertising space, it is best not to do so at election time as advertisers often find that the more intense political nature of a campaign puts them off – especially if they receive a complaint or two from opposition activists. That can then sour future relations and advertising opportunities.

You will not be permitted by the Royal Mail to include adverts on your Freepost election address.

Outside election time selling advertising can be a good source of income. Some seats find it is easier to sell space on a separate flyer delivered at the same time as their Focus, not on the Focus leaflet itself.

Third party expenditure

Aside from what parties and candidates can do, individuals or groups that aim to promote or disparage electoral candidates, at either general elections or local elections, are also subject to controls and restrictions on the campaigning that they can do under the Section 75 of the Representation of the People Act.

These individuals or groups are known as "third parties" and may incur expenditure (referred to as "controlled expenditure") by holding public meetings or organising public displays, or by issuing advertisements, circulars or publications. They can spend up to £700 at a general election "presenting to the electors the candidate or his views, or the extent or nature of his backing or disparaging of another candidate". The limit is £50 plus 0.5p per elector in a local election.

Third parties can also incur national election expenditure, which is also regulated. These third parties may apply to become "recognised" third parties by the Electoral Commission. Upon becoming a recognised third party, the level of controlled expenditure promoting one party or disparaging another increases in the year leading up to an election.

If no recognition has been given, the amount of expenditure permitted is limited to £20,000 in England and £10,000 in Scotland, Wales, and Northern Ireland. If recognition has been given, the limits are considerably higher, varying from £30,800 in Northern Ireland up to £319,800 in England. No more than £9,750 of this can be spent in a particular constituency.

Recognised third parties must complete an expenditure return after the election.

You should always seek advice about and send copies or details of any third party campaigning in your area to the Compliance Office at Party HQ.

23. Polling day

In a very close election, polling day itself can make the difference between winning and losing. The crucial question to ask in making your polling days plans is: is there a Parliamentary seat (or council ward) that is close enough for a good polling day operation to be the difference between winning and losing?

The best polling day operation is the one run in a very close election. If that's not in your patch – go and help the nearest one instead.

In the past, Parliamentary seats and council wards have been lost by only a handful of votes because neighbouring areas did not send enough help on polling day. Instead, they ran energetic polling day operations at home which, predictably, failed to dent the enormous majorities of the opposition.

Planning where to help on polling day

Ask yourself the following questions:

1. Is your own election campaign looking so close that running a full polling day operation makes sense? If so, go ahead and plan one.
2. Is the party hoping to win comfortably (either the Parliamentary seat or, if there are council elections on the same day, in any wards)? If so, plan a polling day based on a full operation initially followed by careful checking of the data and a plan to move and help elsewhere if the data does indeed show things are safe.
3. Do you have any local deliverers or regular tellers who would not be able to move somewhere else to help on the day? If so, then it makes sense to ensure they have something useful to do on the day rather than sit at home doing nothing. **But remember, everyone who is able to move to help elsewhere should have their efforts directed based on the first two questions.**

The best way of helping somewhere else

If you know you may be asking people to help elsewhere on polling day, liaise with the people running that other polling day operation in good

time. The more they know in advance about what help they may receive, the better use they will be able to make of your help.

It also makes sense to talk in advance about whether there are any particular polling day skills your own team would like to learn or improve, and how best to factor that into your plans. For example, you may have a couple of people who are new to using Connect but already know the basics of data entry. It then makes sense to arrange for them to be computer assistants in a committee room elsewhere on polling day so that they learn more about how to use the system and can bring those skills back for future elections in their own patch.

Remember also that with virtual phone banks (VPBs) people can help with phone knocking up without physically having to travel somewhere. So part of the plans may be to have local helpers get together to do phoning for elsewhere on polling day.

Meet the Returning Officer

Nowadays nearly all Returning Officers (ROs) call a meeting of agents to discuss polling day and settle contentious issues well in advance.

If you have not yet been invited to one, make sure the ERO knows you are the Lib Dem agent and has all your correct contact details.

Politely ask when you can meet them to talk about how the campaign will be conducted. If the ERO has already met with the other agents, arrange to see them as soon as possible on a one-to-one basis.

Even if you have been an agent before make sure you have such a meeting. The ERO may give you a great deal of useful information about how they intend to manage the campaign, the count and routine matters on polling day such as what they will do if someone needs an emergency proxy vote for health reasons on the day (will the council send a member of staff around to sort out the paperwork?).

Building a good working relationship with the ERO as soon as possible makes life much easier for them and for you in the long run.

Polling day tasks

Telling

Taking down the polling numbers of each voter as they leave the polling station after voting.

Running

Taking these numbers back to the committee room(s) regularly during polling day from the tellers who are not using a mobile phone/app to electronically send back the data.

Knocking-up

Calling on the voters, remind them it is polling day and offering lifts to the poll, using lists of supporters who have not yet voted provided by the committee room. This can be done both on the doorstep and on the phone. The lists of names of people to call on are called shuttleworths in the Lib Dems.

Data entry

Entering the data from tellers and knockers-up so that the agent can both judge the progress of the day and juggle priorities, and also so that the lists given to knockers-up are as up-to-date as possible.

Lifts

Giving lifts to get voters to the poll. These may be pre-arranged or be a result of knocking up going on in the area. If people tell you they are likely to want a lift, sign them up for a postal vote as soon as you can. Lifts waste an awful lot of time on polling day which is otherwise better spent calling on other voters.

Committee room management

Running the venue which is being used as a committee room, making sure all the tasks are done efficiently, people have what they need (e.g. phone banks for phone callers and knocking up lists for people going out on the doorstep) and the team is kept motivated, fed and watered.

Polling agents

Appointed by the agent, these are the only people other than candidates, and agents allowed to enter polling stations on behalf of our candidate, to check all is well or deal with problems which might arise.

In most areas there is no need to appoint polling agents and there is nothing for them to do, but in areas which problems of (allegations of) intimidation at polling stations, personation (a person pretending to be someone else in order to steal their vote) or poorly run elections, it can be useful to have several extra helpers who can enter a polling station. If you think such problems may arise, contact the Election Law Helpline for more detailed advice about polling agents.

However, it is sensible to appoint one polling agent so that there is someone who can help out the agent in case of illness, transport breakdowns etc. on the day.

Polling agents are appointed in writing by the agent or candidate up to two working days before the poll.

The committee room

This is the venue from which the polling day operation is run in an area. You only need one if you are running a polling day operation; if the team is going to help elsewhere in a different seat then a local committee room is not needed.

The objective of the committee room is to ensure that as many of our (likely) supporters are contacted on polling day as possible, reminding them to vote and given them a final push to make sure the vote is for us. Depending on the circumstances, you may also be leafleting or calling on soft supporters of other parties – particularly the one we are squeezing in order to win tactical votes from – to give them a final push towards us.

One committee room can often look after more than one ward, which is also useful as it makes it easier to move helpers around between areas if that is the case. It all depends on the geography and transport details of the area. In very congested urban areas with large wards, you may even have more than one committee room serving a ward.

You should appoint one person to be in charge of each committee room and make sure everyone understands they are in charge on the day, subject only to the agent.

Finding a good committee room

This is not always easy. You may be lucky and find a member who traditionally has the committee room in their dining room or garden shed.

There are a number of factors which determine whether or not a venue is suitable for use as a committee room:

- Is it close to the polling stations it will be covering?
- Is it easy to find?
- Does it have parking?
- Are there any main roads close by that gridlock during the rush hour, cutting it off from one or more of its polling stations?
- Is it close to public transport?
- Is the person living there happy to have people they don't know tramping in and out?
- Is the person living there very house-proud and insists everyone takes their shoes off before entering the door?
- Is the room you will use close to an outside access door?
- Does the place have pets which must not be allowed to slip out or dogs that are very territorial?
- Is the person living there willing to allow members and helpers to use the kitchen and bathrooms?
- Is there a downstairs toilet?

Running a committee room

Running an effective committee room is something of an art. There is no room for democracy. The committee room organiser (CRO) needs to keep everyone working as hard as they can to get every possible vote out – without exhausting them to the point where they are in a state of collapse by 3pm. Remember polls don't close until 10pm.

The CRO must be able to stay calm and in control of the day's events. They must be able to assess how tired a helper is and decide how best to keep them motivated and working. The CRO must thank everyone at every opportunity.

Do not let someone incompetent run a committee room just because it is 'their special job and they do it like this at every election'.

It is not a place for gossip, a three-course lunch with friends or the best cream tea in the country! Avoid having too many people in the committee room – most should be out knocking up.

A committee room should be the organised calm at the centre of the storm of polling day activity.

The CRO will need at least one assistant to either run the Connect data entry or to help update the manual records. An extra assistant may be needed late in the afternoon as polling speeds up. At this time you will need one assistant per computer.

Do not underestimate how tiring and stressful polling day is for the CRO and assistants. People knocking up will get a break now and again – the committee room staff will not!

Many helpers become fascinated by what is happening in the committee room and want to find out how polling day is going. Some people, if they think we are winning, will not bother to stay to help. Others will just give up if they think we are going to lose. Either way they are probably wrong in their estimate! So the traditional answer to enquiries on the day is always words to the effect of 'It's neck and neck'.

It is up to the CRO to pleasantly, but firmly, keep them away from the computer and statistics print outs. Try to set up the tables or computer in a room helpers cannot enter. Alternatively, set up a barrier of tables and keep helpers outside the door of the committee room itself.

The job on polling day is to keep working everyone as hard as possible, for as long as possible.

Knocking up

Knocking up is a task people either love or hate. Some hardened canvassers hate knocking up and will do anything to avoid it. Others, who will not canvass, are entirely happy to knock up.

The basic technique is to call on our identified supporters who have not yet voted, remind them it is polling day and offer a lift. Knockers up should also get as many supporters as possible to promise that they will go and vote and then repeat back the promise to vote: "That's great that you've said you will vote later for us. I really appreciate you telling me" (or words to that effect).

Being reminded of the commitment they've just made makes the person more likely to vote – and for us - even if we don't manage to call on them again during the day.

The voters' responses should be noted down. If the voter is going to the poll later the time they intend to vote should be passed on to the CRO so that door will not be knocked again until that time has passed. Similarly, if knockers up discover new supporters we did not know about or that someone has died, moved or stopped supporting us that should all be recorded and used to update our data. This is useful not only for polling day itself but also is a rich source of data to help our future elections too.

If knockers up diligently record such information, it is like getting an extra free day of canvassing and the total amount of extra data gathered can be considerable.

Knocking up should start as soon after 9am as possible. Some people, particularly the elderly, will not vote at all if they do not vote in the morning. This is particularly true in very bad or very good weather (or in winter when it gets dark early in the afternoon.) Polling day weather in May can be very unpredictable, anything between pouring cold rain and a heatwave.

A committee room may only get 10 extra people out by knocking up in the morning – but if every committee room in a constituency gets 10 extra people out it may make the difference between winning and losing.

Late-starting knocking-up has lost us too many elections in the past.

Anyone who will not, or cannot, go out knocking up for health reasons, can either spend their time telling, delivering leaflets or helping with the telephone knocking up.

Pace your team members who are knocking up. If they have a rest for an hour at 5pm, they may be able to help again by 9pm when others are flagging. Giving people a break from door knocking by switching to telephoning is a great way of giving legs and feet a rest without letting precious time slip by unused.

Knock and drop leaflets

Every time a door is called on, a leaflet should be dropped or handed to the person who answers. This is not an 'out' leaflet. Every house on the knock up list gets one, whether the occupant is in or not. It should:

- Feature the candidate's name

- Repeat the key campaign messages (including the squeeze message)
- Give a phone number for lifts
- Say when the polls close
- Have an imprint
- Remind people it is polling day – and that they don't need their polling card to vote

You must not refer to actual votes cast so far on the day or any kind of exit poll.

You can and should make generalisations such as 'Please come and vote for Jane Bloggs. She will be a brilliant MP! And it is neck and neck between her and XXXX'.

In a target seat or ward with a full polling day operation, you will need at least three different knock up leaflets. Try printing them in different sizes and on different coloured paper. Depending on the situation, you may also have tactical squeeze leaflets to deliver to the third party's supporters.

You will need enough copies of the first leaflet of the day for everyone on your shuttleworth. You will not need as many of the subsequent rounds of knock up leaflets, as many people will have voted by then.

Knocking up postal voters

Most postal voters will have voted in advance of polling day, but not all of them remember to do so. So, a good polling day operation includes activities to remind postal voters to vote:

- In advance of polling day – knock up your known supporters who have postal votes to ensure they have voted. This can be done by leaflets, letters, phone calls, emails, text messages and/or doorstep visits. Make sure your activists are fully briefed on what can or can't be done – e.g. you shouldn't collect blank postal vote ballot papers from people! You should give all such helpers a copy of the Code of Conduct the party has signed up to.
- On polling day you can again remind postal voters to vote – just include them on your shuttleworths. If someone has forgotten to return their postal vote, it can still be returned by hand to any

polling station in the constituency up until close of poll on polling day.

Differential turnout

One reason why we run a polling day organisation in local elections and by-elections is to improve our differential turnout. In simple terms this means getting a higher percentage of our people to vote than the percentage of the opposition who vote. If you get a higher proportion of your supporters to vote, you can win, even if more people support another party.

This is particularly important for local elections run on their own, and can also make the difference in a very close general election polling day too (even though they have higher turnouts overall).

Connect provides statistics on the relative turnout of our supporters versus other voters and this can be tracked regularly through the day.

Remember that differential turnout often changes during the day due to changing demographics of voters, such as older more Conservative voters tending to vote earlier in the day. You need to know previous differential turnout trends during the day in order to make the most of the numbers – and make sure that this time round they are recorded too for future use.

So an area full of young professionals may see most people vote after getting home from work – which may be after 8pm. Alternatively, a ward with a lot of bungalows and an older, retired population may vote heavily during daylight hours.

Understanding these differential turnout patterns means you can then move resources around on the day to respond to the different patterns of voting - for example, if turnout on a particular modern housing estate is very low during the day on polling day. If you know historically that most people who live there vote in the evening you can do one round of knock ups and then move helpers to another area which normally votes during the day. Then have a big push at knocking up the modern housing estate again at 7pm.

When to finish knocking up

Knocking up should only stop when it is too late for the voter to physically get from his or her front door into the polling station by close of poll. That means at around four or five minutes to close of poll.

During the last half hour before the poll closes, the CRO should start to send the helpers out to knock up the streets closer and closer to the polling station. It is pointless to knock up a voter at 9.50 who has a 12 minute drive to get to the poll. Better to be knocking on doors less than five minutes from the polling station.

Committee room details

The committee room must by law have the committee room poster displayed facing the road. An election offences poster should also be displayed on the inside wall of the committee room along with the Electoral Commission's code of conduct and tellers instructions. Having these other two on display protects the agent and candidate if someone misbehaves – as you have extra evidence that you warned them about what can and can't be done.

You should have a sign-in sheet for helpers, so you can thank them afterwards.

The law was changed a fair few years ago to allow hired rooms and school buildings to be used as committee rooms, so you may be able to get your committee room in the same complex as the polling station. Talk to your Returning Officer to make sure they are aware of this and it is not going to cause problems. You don't want arguments about this on the day. It is up to the RO to decide how much of the site is designated as being within the 'curtilage' of the polling station. If you are using such a venue, you should also discuss the use of any parking spaces with the RO. Otherwise the appearance of cars with posters in them right next to the polling station may cause problems on the day.

Polling stations

There is a Presiding Officer at each polling station. They are in charge and make decisions on what should be done. The only person who can overrule their decision is the Returning Officer.

Sitting in a polling station all day is a rotten job for the Presiding Officer and their clerks. They are usually cold and bored – except when the evening rush is on, and then they are rushed off their feet. If there is a problem, and more often than not it is about or between the tellers, be friendly and polite to the Presiding Officer. This is usually more productive than having an argument.

If all else fails and you are sure you are in the right, contact the Returning Officer and politely but firmly ask him/her to intervene.

There are lots of myths about how close you can have a poster displayed to a polling station. There is no set distance legally. However party political posters may not be permanently displayed within the boundary of the polling station. In practice dropping voters in a car covered in posters is fine. Parking a poster decorated car in the polling station car park for hours will cause big arguments.

Within certain limits, the Presiding Officer can decide what constitutes the boundary of the polling station. Use your common sense on this and don't let your activists play games. It is never a good idea to annoy the Returning Officer on Polling Day – whose goodwill you might need in a close local election count if you are asking for a recount!

Tellers

Tellers stand or sit at a polling station, taking a record of who has voted. This is so that people who go knocking up can skip those who have already voted, making the knocking up quicker and more efficient.

Ask people to be tellers who are not willing or able to knock up or deliver. Often people who are supporters but not members are delighted to help out by telling. They are sometimes thrilled to be asked to help.

Make sure someone checks up on the physical situation at a polling station. If the tellers will have to stand outside in the rain you cannot ask an elderly person to tell there for two hours straight! If they will be sitting in a warm entrance hall of a school, they may be happy to do so.

Make sure that every teller is briefed in advance and has a set of instructions. Tellers should wear a coloured rosette with the name of the candidate, party name and logo. Give every teller their own instruction sheet and lapel sticker or rosette. Do not rely on one teller passing on instructions to the next and so on. These arrangements often collapse about mid-morning of polling day.

Include in the guidance for tellers instructions on how to record other information they may pick up. For example, a voter may voluntarily tell the teller they have voted for us. The teller is not allowed to solicit such information, but if given it, they can record it – and it is free canvass data so you want to make sure they do record it properly.

Make sure also that you have a copy of the Electoral Commission's guidance for tellers in case of any problems; it can be very useful to quote this at a Presiding Officer or the Returning Office.

If the polling station covers more than one polling district, and your tellers are using tellers pads rather than a mobile phone app to record numbers, prepare different coloured tellers pads – clearly marked with the different distinguishing letters as on the register. Make sure the tellers are briefed that there are different sets of numbers from each polling district and how to work out which pad to mark off.

When a new teller comes on duty get someone to pop over and check they have arrived and all is well. On a very cold or wet day, send a thermos of tea or coffee if a teller is on for some hours at a time.

Tendered ballot papers

These are issued to voters who, when they go to vote, cannot because it appears from the marked electoral register that they have already voted. This may be the result of an illegal act (personation) or because of a clerical error by the Presiding Officer or their staff.

However, mistakes cannot be rectified on the day, so the elector is given a 'tendered ballot paper'. These are a different colour, and should be kept separate from the rest of the ballot papers. They will not be included in the count but, if the result is challenged and was close, tendered papers could then be examined. Please ask for advice in advance if this happens regularly in your area.

Voters who need assistance

Blind, disabled or illiterate voters or those physically unable to cast a vote, may all be assisted at the polling station by the Presiding Officer or by a companion who is also an elector at that election, aged 18 or over, or a close relative. They only need to make a oral or written statement to the Presiding Officer to confirm they require assistance.

Local and general election on the same day

Running a joint general and local election polling day is one of the most difficult aspects of an Agent's job – if only because you have lots of different candidates to worry about – not just one! However, if you plan it well in advance, you will find it is fine.

Integrate your campaigns; if you try to run two separate operations you are making life very difficult indeed.

Make sure everyone is clear on the objectives for the day. For example, we may not be in with a chance of winning the Parliamentary seat this time but have chances of winning several local council wards. So the whole integrated polling day operation should be geared towards those wards – and also helping a winnable Parliamentary seat elsewhere if those wards turn out either to be safe or lost causes on the day.

24. The count

In addition to the agent, the candidate and their partner being able to attend the count, the agent has to appoint counting agents in advance by notifying the Returning Officer. The exact number is determined by the Returning Officer depending on the capacity of the count venue and the number of candidates.

Make sure you have two or three of your team there, right at the beginning of the count, especially as the processing of postal votes may start before the first ballot boxes have arrived. The rest of the team should get there as soon as they can after close of poll. The candidate should not arrive at the count until the verification is well under way (and hence until you have a very good idea of the likely result from the ballot box straw polls discussed below).

The team has three jobs at the count:

- To take straw polls of the votes which come out from ballot boxes, both so we know how things are progressing and to provide useful intelligence for future elections.
- To spot any errors that may result in our votes being under-counted or an opponent's votes being over-counted.
- To query any questionable ballot papers.

Everyone on the team must understand they are there to do these three jobs. It is not a social occasion. There are several MPs in the current Parliamentary Party who are only there because of the vigilance of our helpers at the count. Make sure the whole team understands this – and has good enough eyesight to see the ballot papers!

Verification stage

There are two stages of the count itself: verification and then counting.

The verification stage comes first and involves counting the ballot papers in each ballot box to ensure they match the number of papers issued at each polling station. All of your team should be at work during this stage taking straw polls of the votes from each ballot box, to work out how the votes for the parties split.

The Returning Officer and staff will empty each box (and show the counting agents that it is empty). Your team should make a note of the box number. Most Returning Officers will give you a list beforehand of

which numbered boxes are at which polling stations or you can ask at the count to check which number matches up with which location.

The papers are then unfolded and (for a general election or a local election) counted face-upwards with the number of the ballot paper on the reverse concealed. (The rules vary for other sorts of elections, e.g. European elections, as to whether ballot papers are verified face up or face down.)

After being placed face up, the ballot papers are counted into bundles (usually of 20, 25 or 50) and secured with a clip or a rubber band.

Because of the unfolding and placing face up of ballot papers, your team can get a good straw poll of how the votes add up for each candidate in that box. These box counts will be very useful for future campaigning, as you will know the political split of each polling district. Later you can compare the box counts to your canvass predictions in order to see how good your canvassing was. You can also use this data to help plan future election campaigns, such as by spotting a council ward that is more winnable than you previously thought.

It is not unusual for the number of ballot papers counted during the verification to be a handful out from the number of the papers issued, such as due to a minor clerical error. If there is a significant discrepancy the Returning Officer will start the process again. If there is still a discrepancy, the agents will be informed and, unless the size of the discrepancy is a serious cause for alarm, the count will proceed to the next stage.

Once all the boxes have been verified the Returning Officer will announce the total number of votes cast. It is not unusual for the Returning Officer to give their staff a short break at this point.

Counting stage

As soon as the contents of two ballot boxes have been verified, and can be mixed together, the count can begin, i.e. counting the ballot papers into piles for each candidate and batching them into bundles of 20, 25, 50 etc. – whichever number is the local practice.

Sometimes the Returning Officer will wait until all the verifications have been done before progressing to the second stage, but sometimes they will start the second stage whilst the final ballot boxes are still having the first stage completed. Agents therefore need to be very aware of what is

going on in the counting room, and not afraid of asking the Returning Officer if anything is not clear.

You and your team– although tired – need to be vigilant all through the second stage in order to check during this stage that:

- Our votes don't end up on our opponents' piles.
- Doubtful (spoiled) papers don't end up on our opponents' piles.
- If the papers are batched in piles of 50, that there aren't 51 in any of our piles and there aren't 49 in any of our opponents' piles.
- If the result is likely to be close between us and, say, the Tories, there are no Labour, UKIP or Green votes put on the Tory piles.
- An opposition vote isn't placed on the top of a pile of ours, and thus the whole pile counted as theirs.

Only the Returning Officer's counting staff are allowed to touch the ballot papers. If one is placed on the wrong pile, or if it is dropped on the floor, the counting staff must be told about it immediately.

Spoiled papers

At this stage any spoilt ballot papers are taken away for the Returning Officer to decide upon. They will call the candidates and agents forward to witness their decisions on each ballot paper and candidates/agents can express a view on which way the ruling should go on a ballot paper.

The decision is for the Returning Officer. However, a paper can be marked 'rejection objected to', and it may be reconsidered by a court if a close election result is challenged.

If you are slow getting there, the Returning Officer does not have to wait for you before telling everyone else how they intends to rule on each disputed ballot.

The following categories of vote are considered to be 'spoiled':

- If the paper bears no vote or mark at all.
- If the elector has voted for more candidates than there are vacancies up for election.
- If it is not clear which candidate has been voted for, e.g. if intersection of the cross is on a line between two candidates or rather than a cross next to someone's name the word "No" has been written.
- If the ballot paper has writing on it which can be used to identify the voter.

- If the ballot paper does not bear the official mark (usually a watermark but previously often a perforation).

If the result is very close and you are in a recount make sure you fight for every last vote. Remain calm and firm at all costs. You are entitled to object to the Returning Officer's decision on any ballot paper if you think the vote should have been ours or should not be allocated to someone else. In practice there is little point in having this argument unless the result looks very, very close or you are close to losing your deposit.

Where there is a clear winner and no one is in danger of losing their deposit the examination of the spoiled papers is very low key.

If the count is close and a recount is looming, the whole atmosphere around this procedure becomes much more tense. Whatever you do, stay calm and put your case firmly but without aggression. If you upset the Returning Officer you undermine your chance of putting your case effectively.

Finishing the count

As the bundles of votes are made up they are taken to the centre of the room and are usually stacked in such a way that it is clear how the result is going. Only the agent and the candidate have the right to go and look at the stacked bundles – but not to touch them unless invited by the Returning Officer to do so.

Once all the votes have been counted they will call the candidates and agents together again and privately tell you all the current figures.

One of the most common sources of problems at counts are arithmetic mistakes at the end. For example, all the ballot papers may have been counted into bundles perfectly, but if the number of bundles is added up wrongly you'll get the wrong result. So the agent must pay particular attention to the numbers they are given at this stage, and should query them immediately if they show us losing and don't appear to add up or are clearly out of line with our ballot box tallies from the verification.

Recounts

The agent can request a recount, but cannot demand one. You should request a recount if:

- The result is very close and you are just behind.

- You are a few votes short of saving your deposit.
- The count has been conducted in a blatantly inefficient manner and you are behind.

It is firstly advisable to ask for a bundle-check, to ensure that the winner's pile does not contain bundles for your candidate or for a minor candidate, and to check all piles to make sure none of yours are lurking in them. Also, to flip through each bundle to ensure that the ballot papers underneath are the same as the one on the top. If, after a bundle check, you still don't have quite enough votes then ask for a full recount.

If, after the recount, the figures have changed, ask for another recount – and continue asking until you are ahead or two consecutive recounts agree (if the Returning Officer has the patience to allow it).

Remember that the Returning Officer does not have to grant a request for a recount. It is their decision based on how confident they are that an accurate result has been reached.

Demanding a particular decision or a recount will often be counter-productive when everyone concerned is overtired and stressed. So be unfailingly polite, reasonable and respectful.

The declaration

When the count, recounts and adjudication on spoiled papers have been completed, the Returning Officer will call the agents and candidates together. They will tell them what the final result is before moving to formally declare the result. This is a final opportunity to query something, such as if the total number of votes does not appear to add up. Do not be afraid to ask the Returning Officer to repeat the numbers or tell you what the total votes cast were; that can also buy you a few extra moments to think through whether or not the numbers sound right.

Practical tips

Find out whether refreshments are provided at the count. Try to get a quick bite to eat before you go to the count – at least a sandwich or a bowl of soup or yogurt. You probably won't be hungry but this is important: you may have been up since 4am on polling day and may not have eaten much all day. It is not unusual for General Election declarations to be made well past 3am.

Always take a bottle of mineral water, diet cola, a packet of aspirin and a couple of chocolate or snack bars into the count with you. Bananas also make good food to have with you – high energy!

Make sure your team are well under control. Don't let anyone on the floor of the count bring alcohol with them or buy it if there is a bar. Leave known hotheads to run the post poll party and watch the national results on TV. Make it clear that you want everyone to behave with dignity – win or lose. Some normally sensible people can get very hostile at the end of a count when they are tired and over-emotional.

Have your media lines for the result – good or bad – prepared in advance. Everyone will almost certainly find themselves far too tired after the result to work out these lines in detail, so preparation is essential. You will also often find that local journalists have very little background information about such issues, so providing them with a timely set of such points can help generate very good coverage for our result. Remember to get the lines up promptly on social media and the local website.

Dress for comfort. Layers are best as temperatures in a count can vary wildly over time. Wear shoes you can stand in for up to six hours – trainers are ideal.

Managing the candidate at the count

By the end of the campaign you will probably have a good understanding of your candidate's temperament. Do not underestimate the stress level for them at the count. This is where reality hits home, win or lose, and it is a very emotional experience.

Send them off to get a meal with a minder before coming to the count. The minder needs to have a charged mobile phone with them – in a place where reception is good.

The candidate should turn up after you have a good idea of what the result will be – so they have a chance to adjust themselves to the outcome in private first. Even if everyone knows well in advance what the result will be, it can still be quite a psychological adjustment to take it on board when it becomes real at the count.

Someone must be with the candidate at all times during the count. It is not unknown for candidates to get into an argument with an activist from another party during the count.

If your candidate is of the opposite gender to their minder, find someone who can accompany them to the ladies or gents toilets – particularly important in a target seat where unscrupulous journalists or other candidates may follow them in, looking for a private discussion; believe us when we say it has happened!

The candidate will usually be asked to give a speech after the declaration. Make sure this is written in advance with options to cover the likely possibly outcomes. If yours is a high-profile media seat, the candidate's speech should have the political points first and then the thank-yous.

25. Election expenses return

Agents have to submit a legal form detailing the election expenses after polling day. It includes both income and expenditure and, despite the name, you do not receive any actual refund of money.

Submitting your returns accurately and on time is a crucial job. Failure to submit your returns accurately and on time is a criminal offence for which the agent is liable.

Calculating your election expenses limit

There is a strict legal limit on how much you are allowed to spend on your candidate's campaign. You need to calculate this at the beginning of the campaign, for every individual election. Remember the limit varies from constituency to constituency and council ward to council ward.

The amount you are legally permitted to spend in a Westminster parliamentary election campaign is governed by whether you are in a Borough Constituency or a County Constituency (as defined by the Boundary Commission). It will also depend on the size of your electorate. You can find out from your ERO whether your seat is a Borough or County Constituency.

There are two periods in which your expenses are limited:

- **The long campaign:** this period does not exist for the 2017 general election because it is taking place so soon after the previous general election
- **The short campaign:** which starts the *day after* the date the candidate officially becomes the candidate (usually when Parliament is dissolved, assuming they have been selected in advance)

Note: there is scope for some flexibility over exactly when a candidate officially becomes one. In a key seat expecting to spend right up to the limit this can matter, but otherwise you do not need to worry about it. Seek advice from the Campaigns and Elections Department at HQ if it does apply.

All expenditure promoting the candidate in either period needs to be included in the election expense return form. This **does not** include:

- Costs of normal party operations unrelated to the election.
- Items which are included in any local election expense returns for council elections which take place at either on the same day as the

general election or have part of their campaign overlapping with the controlled period.

- Items which count against the national expenditure limit, such as an insert for a mailing that is just about the party's achievements in government without local references. The Compliance Guide from Liberal Democrat HQ sets out information on what can be spent against national limits and how to record it. **Those rules must be followed exactly and have changed from previous years.**

The expense limits for 2017 are:

Short campaign: £8,700 + 6p/9p per registered Parliamentary elector in a constituency (for borough/county constituencies)

The borough / county constituency distinction is a very specific legal one. Do not guess based on the name of the seat or how rural it is! Get the Returning Officer to confirm in writing what sort of constituency it is.

Number of electors

Candidate expenses limits depend on what kind of election you are fighting and how many electors there are. To calculate the expense limit, you need to know the number of electors eligible to vote in the election, who are on the register in force on the last day for publication of the notice of poll.

Bear in mind that some electors are not eligible to vote in every election (such as members of the House of Lords or EU citizens). It is only the version of the electoral register that applies to your election that is used to calculate the election expense limit. If you have a register with others included, you must exclude them from the calculation.

Ask the ERO for their calculation of the electoral register size. However, do not rely on the ERO to calculate the expenses limit for you – if they get it wrong, that does not absolve you of your legal responsibility.

This is one reason why we always advise you never to spend right up to the limit. Leave yourself a small cushion for an unexpected bill or discovering there are fewer electors than you thought when first calculating the expenses limit.

Apportioning Expenses

You are likely to find that you have some bills which apply to more than one expenses return. For instance:

- A leaflet which talks about both the general election candidate and local election candidates. This would need to be split between the general and local election returns.
- If you use literature which has some local stories but also some that have been artworked nationally and do not mention your candidate at all, then part of the costs can be allocated against the national expense limit.

In cases like these you take the total cost of the campaign material and split it up between the different campaign returns. For example, if a Focus leaflet promoted a Parliamentary candidate and a local candidate equally, you would put 50% of the cost of the leaflet on the Parliamentary return and 50% on the local election return.

In some cases, it is not obvious how much should be apportioned to each campaign. You must make a judgement about what proportion of an item of expenditure benefits which campaigns.

For instance, if your Parliamentary candidate is clearly more prominent on a particular leaflet than a featured council candidate for that ward, then you should attribute more than 50% of the cost to the Parliamentary returns.

It can help to consider the surface area of the leaflet devoted to each candidate or campaign; for example, compare the space allocated to stories and pictures about the Parliamentary candidate to the space allocated for stories covering the local election campaign and which do not feature the Parliamentary candidate.

It is down to you to judge exactly how much to put in. As long as your decision is judged to be reasonable, you will be safe. A good rule is to imagine having to explain your decision to a jury (likely to be people sceptical about politicians and politics). Would your explanation sound reasonable or devious? Is it consistent across the campaign?

Make notes showing your reasoning for apportioning costs in case anyone challenges your returns, including the details of any calculations. Keep these notes safely in case they are needed.⁸

⁸ The failure to keep such records was one of the reasons for the Electoral Commission imposing a record fine on the Conservative Party in 2017.

If you are splitting costs between different expense returns, make sure that the split costs add up precisely to the correct total. This is something the Electoral Commission increasingly frequently checks up on.

What to include in your election expense return

You must include in the returns everything which you purchased in connection with the election. You also need to include items that were given free, or at more than 10% discount if their market value, is more than £50. If this is the case then their market value must feature in your expense return.

The candidate's deposit does **not** count towards the election expenses limit.

Common items to include are:

- All printing of items which encourage votes for your candidate.
- An "omnibus invoice" from the local party for campaign services rendered. This is where you can cover items such as use of the Connect database, stationery from stock, hire of rosettes, paperclips, rubber bands, use of computer consumables such as laser and inkjet cartridges, etc.

Note: as the Connect database is used all year round and for other elections, the hire cost should reflect this and as a result, may be quite low.

Get your local party to purchase miscellaneous election supplies like canvass cards, shuttleworths, tellers pads, rosettes, etc. in advance. Then, when the election comes, the agent can be billed just for those quantities actually used.

This omnibus invoice can also include the share of costs for the local party website and so on if they were partly used for the campaign.

- Items from stock – envelopes, stationery, posters left over from a previous campaign, etc. should also be billed by the local party.
- If you use items such as loudspeakers, sledgehammers, poster boards, etc. which are owned by the local party, then the local party should bill the agent for a reasonable hiring charge.

- Remember to include such items as wallpaper paste, nails, wire, etc. to use with the stakeboards you have hired from the local party.
- If you already have a constituency HQ, the costs of rent, water, electricity, phone, etc. used during the period of the campaign must be apportioned and included on the return. Do not forget to include business rates too. You may wish to hire only one room as a campaign office in the building – if that is all you use. This can all be covered by an invoice from the local party – but it must be a true reflection of the cost. If you hire premises especially for the campaign, their costs must feature.
- Office equipment such as computers, barcode readers etc. should be hired from the local party.
- For the phone costs, you should warn the phone company when the campaign begins that an apportioned bill will be required for the period of the campaign. Ensure that they know that, within days of polling day, they will be required to deliver their apportioned bill. BT have procedures for dealing with this, but only if warned first. Make sure you find out whether or not they are prepared to give you an invoice at the end of the campaign. This is often a problem.
- Phone costs run up by individuals are likely to be covered by the £50 exemption (see below) and if so do not need including.
- The agent should invoice the campaign for any substantial personal expenses incurred during the election period. This may include substantial mobile phone costs, so changing to a sensible phone contract with lots for free hours of calls and text may be a help.

Common items which you do not need to include are:

- You don't need to pay helpers for their labour (unless they insist!). People can give their time for free. The incidental expenses of your helpers also do not have to be paid for. If they already own any equipment they use during a campaign, e.g. a car or telephone, then any expenses associated, such as petrol, are not a campaign expense.

This also means you do not need to include volunteer time spent by our staff that we do not pay them for (but any expenses we meet for them, such as transport or accommodation, do count as spending - as do the costs for their hours spent on the campaign as

part of their job).

- Use of someone's main residence, provided free of charge (e.g. to put up the candidate or volunteers).
- Use of someone's personal car or other means of transport acquired principally for that person's personal use and provided free of charge.
- Costs of events that are only for party members.
- Spending on items that are not used (for example if leaflets are never distributed). But you should retain the unused material or evidence it was destroyed. This is particularly important if some leaflets on an invoice were delivered but others were not, and so when the invoice goes in to the expense return you are only counting part of its value.

Top tip: keep all undelivered leaflets until after polling day. Then pile them up clearly in one place and take digital photographs of them before recycling them.

- Low value gifts in kind to the campaign. Anything given for free, or at more than 10% discount must still be included in your returns if the value is more than £50. You should give the market value for these items. However, if the value is less than £50, the gift in kind does not count towards your expense limit. Most committee rooms, for example, will 'cost' less than £50 to the campaign, so you don't need to worry about including a nominal sum for their use. Similarly, if a deliverer bakes cakes for the campaign or sticks a few stamps on some target letters they were not able to deliver, that does not need including as long as the postage does not exceed the £50 threshold.
- Thank you party: the costs of a thank you party after polling day do not need to be included in your return.

Some costs will be split across more than one campaign, for example if two neighbouring constituencies shared the same office space. You can split costs between the two returns.

You need to include invoices or receipts in your returns for all items of £20 or above.

However, keep receipts for everything, no matter how small. Keeping all bills and receipts will help you to work out your exact expenditure later, and also ensure that you don't omit any payments from your returns because you forgot about them.

If you encounter difficulties when completing your expense returns, or have queries about what to include, please ask for help rather than muddling through. It is easier to sort out problems before you make an error, rather than after you've done it and the opposition or media are giving you a hard time.

Hustings meetings

The Electoral Commission issue guidance on how to cost these. In short, if all candidates are invited to a hustings meeting, then the event does not count as an election expense (as everyone is being treated equally). Note – it is who is invited that matters, not who attends.

However, if only some – not all – candidates are invited to a hustings meeting, then the costs may need to be accounted for in the election expense returns of the candidates invited.

The organisers of the hustings meeting will not normally expect to be paid – so this is a case of notional expenditure. The organisers need to provide you with the total cost of the meeting, split between the number of candidates who **attend**. If the cost per candidate is more than £50, it should be included as a notional expenditure (and a gift in kind) for the campaign. If it is £50 or less, then it can be disregarded.

If you are intending to spend close to the election expense limit, be very careful about what invitations you accept – especially if the meetings concerned are in large, expensive venues. They could cause big problems for your budget.

If in doubt, insist to the organisers that all candidates should be invited. Naturally you may wish to take into account who is standing for election before following this course of action.

Candidate's personal expenses

These do not count towards the total for election expenses in UK Parliamentary elections, Police & Crime Commissioner elections in England and Wales, Greater London Authority elections, Scottish Parliamentary, Welsh Assembly and Northern Irish Assembly elections and (since 1 July 2014⁹) local government elections in England and Wales.

They can be paid by the candidate up to a certain limit but beyond that need to be paid by the agent (although they still do not count towards the election expenses limit). Check up as to the currently allowed limit for candidates paying personal expenses themselves.

If the candidate pays any personal expenses themselves, then as part of the agent's job in completing the election expenses paperwork after the election, the candidate needs to provide the agent with a written statement of those personal expenses they paid directly.

The candidate's personal expenses include such items as petrol for their personal car and other travel for the candidate for example train fares. If the candidate stays in a hotel or guesthouse overnight, the cost should be counted in this total.

In practice, the total for the candidate's personal expenses is likely to be fairly small unless they live some distance away from the constituency or have disability-related costs.

The agent must authorise election expenses

We have said it before, but it is worth repeating because it is so important. The fact that the agent must do the election expense return form is often a helpful way to keep over-enthusiastic helpers or candidates under control – even if they are keen to go off and do things, they will understand that if you are legally responsible for the form, then they need to work through you.

When you come to sign your declaration that your returns are correct and true, you are swearing that all expenditure was paid by **you**.

If in doubt about what anyone may want to do, put in writing to them the legal need to go through you.

⁹ Transparency of Lobbying, Non-Party Campaigning and Trade Union Administration Act 2014, Section 37.

Expense limits mean you must not spend more.

Deadlines must not be missed.

***Ask for help if you think you have a problem – things are
probably not half as bad as you think.***

Always keep a copy of your returns, including copies of all the receipts or invoices, in case queries arise later.

26. Challenging an election

An election petition is the only way of challenging an election result if an offence was committed, the result declared incorrectly or a disqualified person elected.

However, before rubbing your hands with glee when you think the opposition have made a blunder, please bear the following in mind.

If you wish to bring an election petition against someone, it has to be done within 21 days of the declaration of the result (or within 21 days of the election expense returns being delivered if it is challenged on that basis). Moreover, in order to bring such a petition, a deposit of up to £5,000 must be made in advance. The court will fix the exact sum. If your petition is unsuccessful, you lose the money.

A few years ago, one Liberal Democrat local party launched a challenge without first seeking advice. One of their local members was a lawyer who acted for the local party. The challenge came to nothing and the legal costs of the case came to around £25,000 – which the local party had to pay.

Therefore launching a petition means you need to move quickly and have very strong grounds to be worth the big financial risks. If you think you may be in this situation, seek advice from the Compliance Office at LDHQ immediately.

***Do not launch any legal action without getting advice from
LDHQ first***

You are entitled to inspect your opponents' election expense returns and to obtain copies if you wish. These will not only reveal whether they can fill in their forms properly and perhaps show you that an offence has been committed, but may provide you with useful information about their campaign for future reference. If you want photocopies, you may be charged a small sum per sheet.

27. Appendixes

Election timetable

Event	Number of working days* before poll	Date (deadline is midnight unless otherwise stated)
Dissolution of Parliament	25 days	Wednesday 3 May
Receipt of writ	24 days	Thursday 4 May
Publication of notice of election	Not later than 22 days (4pm)	Not later than 4pm on Monday 8 May
Delivery of nomination papers	From the day after the publication of the notice of election until the sixth day after the date of dissolution	Between 10am and 4pm on any working day after publication of notice of election until 4pm on Thursday 11 May
Deadline for delivery of nomination papers	19 days (4pm)	4pm on Thursday 11 May
Deadline for withdrawals of nomination	19 days (4pm)	4pm on Thursday 11 May
Making objections to nomination papers (except for objections on the grounds that an individual candidate may be disqualified under the Representation of the People Act 1981)	Between 10am and 12 noon on Thursday 11 May objections can be made to all delivered nominations; between 12 noon and 5pm on Thursday 11 May objections can only be made to nominations delivered after 4pm on Wednesday 10 May	4pm on Thursday 11 May
Deadline for the notification of appointment of election agent	19 days (4pm)	4pm on Thursday 11 May

Publication of statement of persons nominated, including notice of poll and situation of polling stations	If no objections on 19 days (at 5pm). If objection(s) are made: Not before objection(s) are disposed of but not later than 18 days (4pm)	If no objections: at 5pm on Thursday 11 May. Objection(s) made: not before objection(s) are disposed of but not later than 4pm on Friday 12 May
Publication of first interim election notice of alteration	19 days	Thursday 11 May
Deadline for receiving applications for registration	12 days	Monday 22 May
Deadline for receiving new postal vote and postal proxy applications , and for changes to existing postal or proxy votes	11 days (5pm)	5pm on Tuesday 23 May
Deadline for receiving new applications to vote by proxy (not postal proxy or emergency proxies)	6 days (5pm)	5pm on Wednesday 31 May
Publication of second interim election notice of alteration	Between 18 days and 6 days	Between Friday 12 May and Wednesday 31 May (inclusive)
Publication of final election notice of alteration	5 days	Thursday 1 June
Deadline for notification of appointment of polling and counting agents	5 days	Thursday 1 June
First date that electors can apply for a replacement for lost postal votes	4 days	Friday 2 June

Deadline for notification of appointment of sub agents	2 days	Tuesday 6 June
Polling day	o (7am to 10pm)	7am to 10pm on Thursday 8 June
Last time for re-issue of spoilt or lost postal votes	o (5pm)	5pm on Thursday 8 June
Deadline for emergency proxy applications	o (5pm)	5pm on Thursday 8 June
Last time to alter the register due to clerical error or court appeal	o (9pm)	9pm on Thursday 8 June
Delivery of return as to election expenses	Within 35 calendar days after the date the election result is declared	If result declared on Thursday 8 June: by Thursday 13 July. If result declared on Friday 9 June: by Friday 14 July
Sending postal vote identifier rejection notices	Within 3 months beginning with the date of the poll	By Thursday 7 September 2017

** The days which are disregarded in calculating the number of working days are Saturday, Sunday, bank holidays and any day appointed for public thanksgiving or mourning.*

Committee Room Poster

To be displayed in every committee room and HQ

Corrupt Practices Bribery

A person is guilty of bribery if they directly or indirectly give any money or procure any office to or for any voter, in order to induce any voter to vote, or not vote, for a particular candidate; or to vote or refrain from voting. It is both a common law offence and a "Corrupt Practice" in election law. (see punishments below).

A person shall be guilty of bribery if he directly or indirectly, by himself or by any other person on his behalf:

(a) gives any money or procures any office to or for any voter or to or for any other person on behalf of any voter or to or for any other person in order to induce any voter to vote or refrain from voting; or

(b) corruptly does any such act as aforesaid on account of any voter having voted or refrained from voting; or

(c) makes any such gift or procurement as above to or for any person in order to induce that person to procure, or endeavour to procure, the return of any person at an election or the vote of any voter,

or if upon or in consequence of any such gift or procurement as above he procures or engages, promises or endeavours to procure the return of any person at any election or the vote of any voter.

A person is still guilty if the bribe occurs after the election. The offer to bribe is sufficient even if rebuffed. The bribe must however be operative at the time of election; repenting and handing back the bribe before the election will not upset the election. It does not matter how long the corrupt act was before the election. It is just as much bribery as if it were offered at election time.

Treating

A person is guilty of treating if he corruptly, by himself or by any other person, either before, during or after an election, directly or indirectly gives or provides, or pays wholly or in part the expense of giving or providing, any meat, drink, entertainment or provision to or for any person-

(a) for the purpose of corruptly influencing that person or any other person to vote or refrain from voting; or

(b) on account of that person or any other person having voted or refrained from voting, or being about to vote or refrain from voting.

The person must act "corruptly" and that there must be an intention to influence the voting.

Every elector or proxy for an elector who corruptly accepts or takes any such meat, drink or entertainment or provision shall also be guilty of treating.

Treating is both a common law offence and a "Corrupt Practice" in election law. (see punishments below).

Undue influence

A person shall be guilty of undue influence-

(a) if he, directly or indirectly, by himself or by any other person on his behalf, makes use of or threatens to make use of any force, violence or restraint, or inflicts or threatens to inflict, by himself or by any other person, any temporal or spiritual injury, damage, harm or loss upon or against any person in order to induce or compel that person to vote or refrain from voting, or on account of that person having voted or refrained from voting; or

(b) if, by abduction, duress or any fraudulent device or contrivance, he impedes or prevents, or intends to impede or prevent, the free exercise of the franchise of an elector or proxy for an elector, so to compel, induce or prevail upon, or intends so to compel, induce or prevail upon, an elector or proxy for an elector either to vote or to refrain from voting."

A person need not be successful in his attempts for the offence to be committed.

Undue influence is both a common law offence and a "Corrupt Practice" in election law.

Personation

A person shall be guilty of personation at an election if he-

(a) votes in person or by post as some other person, whether as an elector or as proxy, and whether that other person is living or dead or is a fictitious person; or

(b) votes in person or by post as proxy-
(i) for a person whom he knows or has reasonable grounds for supposing to be dead or to be a fictitious person; or

(ii) when he knows or has reasonable grounds for supposing that his appointment as proxy is no longer in force.

Personation is both a common law offence and a "Corrupt Practice" in election law. (see punishments below).

Illegal Practices

Advertising -Paying money to an elector for exhibiting bills or posters other than those whose ordinary business is that of an advertising agent. The receiver is also guilty.

Unauthorised Expenditure - the incurring or paying by the candidate or the election agent of any election expense in excess of the maximum amount allowed.

False Statement - knowingly publishing a false statement of the withdrawal of a candidate for the purpose of promoting or procuring the election of another candidate or a false statement of fact relating to the candidate's character or conduct for the purposes of effecting the return of any candidate.

Imprint

no election material must be published without including the following relevant details, which are-

- (a) the name and address of the printer of the document;
- (b) the name and address of the promoter of the material; and
- (c) the name and address of any person on behalf of whom the material is being published (and who is not the promoter).

The relevant details must be printed as follows-

- (a) on a document consisting (or consisting principally) of a single side of printed matter, the relevant details must appear on the face of the document;
- (b) on a printed document other than single sided, the relevant details must appear on the first or last page;
- (c) when material is an advertisement contained in a newspaper or other periodical-
 - (i) the name and address of the printer of the newspaper or periodical must appear on the first or last page;
 - (ii) the relevant details must be included in the advertisement.

Imprints are required on electronic material such as e-mails and websites.

Broadcasting -to use any television or other wireless transmitting station outside the UK for the transmission of any matter having reference to the election to influence with intent persons to vote or refrain from voting.

Employing Canvassers

If a person is, engaged or employed for payment or promise of payment as a canvasser either before, during or after an election, for the purpose of promoting or procuring the election of a candidate then the person employing him and the employee is guilty of illegal employment and an illegal practice if the employer is the candidate or agent.

Disturbing Election Meetings

It is an illegal practice for a person at a lawful public meeting held with reference to a local government election in the electoral area for that election in the period beginning with the last date for publication of the notice of election and ending with the day of election to act, or incite others to act, in a disorderly manner, for the purpose of preventing the transaction of the business for which the meeting was called.

Imitation Poll Cards

It is an illegal practice for any person, for the purpose of promoting or procuring the election of a candidate at a parliamentary election, to issue any poll card or document so closely resembling an official poll card as to be calculated to deceive.

Illegal Payments

Where a person knowingly provides money for any payment which is contrary to the provisions of the Representation of the Peoples Act 1983, or for any expenses incurred in excess of the maximum amount allowed by the Act, or for replacing any money expended

in any such payment or expenses they are guilty of an illegal payment.

Withdrawal of candidate

Any person who corruptly induces or procures another person to withdraw his candidature at an election in consideration of a payment or promise of payment is guilty of an illegal payment

New Regulations

False registration information and false postal/proxy voting application

It is an offence to supply false information in relation to the registration of electors to the Electoral Registration Officer. It is also an offence to provide false information in connection with an application for a postal or proxy vote. False information includes a false signature.

False application to vote by post or by proxy

It is an offence to falsely apply to vote by post or proxy with the intention of depriving another person of a vote or gaining a vote to which a person is not entitled.

Multiple voting and proxy voting offences

There are various offences regarding multiple voting and proxy voting, including

- 1) voting by post as an elector or proxy when subject to a legal incapacity to vote;
- 2) voting more than once in the same authority elections.
- 3) applying for a proxy without cancelling a previous proxy appointment;
- 4) and inducing or procuring another to commit one of the above offences.

There are also a number of non-electoral offences which may be relevant, for example:

- making a false statement under the Perjury Act
- forgery
- using a false instrument under the Forgery and Counterfeiting Act 1981
- conspiracy to defraud
- perverting the course of justice
- Libel, slander and defamation

Punishments

Most offences are investigated by Police Special Branch and some are dealt with in the High Court with the punitive legal costs that employing QC's involve. Cases are taken against the candidate and/or the agent.

For corrupt practices.

For Personation up to 2 years in prison or a fine or both. For Bribery, Treating, and Undue Influence up to 1 year in prison or a fine or both.

Any person convicted of a corrupt practice is disqualified from standing for election or voting in elections for 5 years. If in elected office they are removed and a by election is triggered.

For illegal practices.

A fine up to maximum on level 5 of the standard scale - currently £5,000 Any person convicted of an illegal practice is disqualified from standing for election for the period for which he was elected to serve or for which if elected he might have served, and if at the date of the report he holds any elective office it is vacated at that date. This is so whether there is personal guilt or guilt by agent. He is also disqualified from registration and voting for 3 years.

If any individual receives a prison sentence of three months or above for any crime (whether suspended or not) then they are disqualified from any council on which they might sit and from standing for election.

Other offences exist that relate to specific areas of the election e.g. The count and election expenses returns that are not listed here.

ALDC April 2008

Electoral Commission's code of conduct

This code of conduct for campaigners covers electoral registration, postal voting, proxy voting and polling stations, and the Liberal Democrats have signed up to follow it. Failure to follow it may result in expulsion from the party.

Campaigners are an essential element of a healthy democracy, and their right to put their arguments to voters should be supported and protected. It is equally important, however, to ensure that the activities of campaigners do not bring into question the integrity of the electoral process.

This Code provides a guide for campaigners, electoral administrators and police forces to what is, and is not, considered acceptable behaviour at polling stations and in the community during the lead-up to polling day.

As a guiding principle, if there is any doubt about a particular activity, campaigners should ask themselves "What would a reasonable observer think?"

More detailed guidance about electoral offences can be found in the guidance for candidates and agents, which is available at:
<http://www.electoralcommission.org.uk/i-am-a/candidate-or-agent>

The Code has been sent to all registered political parties in Great Britain, and Returning Officers will draw it to the attention of all candidates and parties contesting elections.

Some Returning Officers may identify the need to develop and seek agreement to specific local provisions which supplement the terms of this Code, in order to address identified local risks. Returning Officers must consult with local campaigners and the relevant national Nominating Officers as well as police forces to secure appropriate local agreement to such provisions, and should ensure that they are communicated and well-understood by campaigners locally.

Scope of this code

This code covers all those actively involved in campaigning in elections or referendums in Great Britain. All references to campaigners in this code include:

- Candidates standing at an election, their agents and their staff and supporters
- Political party officers, members and supporters campaigning at an election
- Other people and organisations campaigning for or against a candidate, a group of candidates or a party at an election
- People and organisations campaigning for or against a particular outcome at a referendum

Compliance with this code

Any concerns that this code has been breached should be raised first with the candidate, political party or campaigner in question.

Any further concerns should be drawn to the attention of the Electoral Commission. The Commission will raise them with the relevant party or campaigner if appropriate, and will agree appropriate actions to remedy or prevent a reoccurrence of any breach.

1 Electoral registration and absent vote applications

1.1 Campaigners should be free to encourage voters to register to vote and apply to vote by post or appoint a proxy to vote on their behalf, if that is the most convenient way for them to vote.

Campaigners can help to inform voters about how to participate in elections, and Electoral Registration Officers should support you by providing you with a reasonable number of registration and absent vote application forms on request. Voters can also register online at: www.gov.uk/register-to-vote

1.2 Campaigners should ensure that any electoral registration forms and postal or proxy voting application forms conform fully to the requirements of electoral law, including all the necessary questions and the options open to electors.

You can download electoral registration forms from www.gov.uk/register-to-vote and absent vote application forms from www.aboutmyvote.co.uk

1.3 Campaigners should ensure that the local Electoral Registration Officer's address is clearly provided as the preferred address for the return of registration and absent vote application forms.

To ensure voters can make their own choice about how to return registration or absent vote application forms, you should always clearly provide the relevant Electoral Registration Officer's address as the preferred return address, even if an alternative address is also given. This will also minimise the risk of suspicion that completed applications could be altered or inadvertently lost or destroyed.

1.4 Campaigners should send on unaltered any completed registration or absent vote application forms given to them to the relevant Electoral Registration Officer's address within two working days of receipt.

To minimise the risk of absent vote applications being refused because completed forms arrive with the Electoral Registration Officer after the statutory deadline before a poll, you must ensure that there is no unnecessary delay in forwarding on application forms which you receive directly.

1.5 Campaigners should always explain to electors the implications of applying to vote by post or appointing a proxy.

It is important that electors understand that they will not be able to vote in person on polling day if they or their proxy apply for and are granted a postal vote, and will not be able to vote in person if their appointed proxy has already voted on their behalf. To avoid duplication and unnecessary administrative pressures for Electoral Registration Officers, campaigners should try to ensure that electors who are included in current postal or proxy voter lists, or have already applied for a postal or proxy vote for a particular poll, do not submit an additional application.

Postal vote applications

1.6 Campaigners should never encourage electors to have their postal ballot pack redirected to anywhere other than the address where they are registered to vote.

Electors should take care to protect their ballot paper and postal ballot pack, and they will be best able to do so at their home address unless there are compelling reasons why receiving the postal ballot pack at the address where they are registered to vote would be impractical. Electors must state on the application form the reason why they need their postal ballot pack sent to another address.

Proxy vote applications

1.7 Electors should be encouraged to explore other options for people to act as a proxy – including relatives or neighbours, for example – before a campaigner agrees to be appointed as a proxy.

To minimise the risk of suspicions that campaigners may be seeking to place undue pressure on electors, electors should not be encouraged to appoint a campaigner as their proxy.

2 Postal voting ballot papers

2.1 Campaigners should never touch or handle anyone else's ballot paper.

If you are asked for assistance in completing a ballot paper, you should always refer the voter to the Returning Officer's staff at the elections office who may be able to arrange a home visit if necessary. Assistance will also be available for electors at polling stations.

2.2 Campaigners should never observe voters completing their ballot paper. If you are with a voter when they complete their ballot paper, remember they should always complete it in secret.

You should ensure that the voter seals both envelopes personally and immediately after completing their ballot paper and postal voting statement. If you are asked to give advice, it is acceptable and often helpful to explain the voting process, but do not offer to help anyone to complete their ballot paper.

2.3 Campaigners should never handle or take any completed ballot paper or postal ballot packs from voters.

Wherever practical, you should encourage voters to post or deliver the completed postal ballot pack themselves. If you are approached or asked for help by a voter who is unable to post their completed postal ballot pack or make any other arrangements for it to be returned in time, you should contact the Returning Officer to ask them to arrange for it to be collected. The Returning Officer may agree that it would be in the voter's best interest for you to deliver the completed postal ballot pack to the relevant office or polling station, if there are no feasible alternative options.

3 Campaigning outside polling places

3.1 Campaigners should be allowed to put their messages to voters on polling day, including in public spaces outside polling places.

Polling station staff and police officers should not seek to discourage or remove campaigners who are otherwise peacefully communicating with voters, as long as they are not within or impeding access to the grounds of the polling place. You should be careful, however, to ensure that your approach is proportionate and should recognise that groups of supporters may be perceived as intimidating by voters.

3.2 Campaigners should keep access to polling places and the pavements around polling places clear to allow voters to enter.

The Presiding Officer is responsible for maintaining order in the polling place, and you may be asked to move by polling station staff or police officers if you are impeding access by voters to a polling place.

4 Complaints and allegations about electoral fraud

4.1 Campaigners should be prepared to give the police a statement and substantiate any allegations of electoral fraud they make.

The police will investigate allegations where someone is prepared to provide evidence or a statement in support of the complaint, but unsubstantiated claims about electoral fraud have the potential to damage confidence in the integrity of the electoral process. You should ensure you are confident that evidence can be provided to the police before considering whether it is appropriate to publicise any specific allegation.

4.2 Campaigners who are concerned or think that electoral fraud may have taken place should raise the matter with their election agent or local party, or with the relevant Electoral Registration Officer or Returning Officer for the area.

They may be able to explain whether or not an election-related crime has been committed, and refer it to the police if appropriate or provide details of the police contact for the relevant area so that campaigners can report their allegation. Concerns about breaches of the political finance rules should be raised directly with the Electoral Commission.

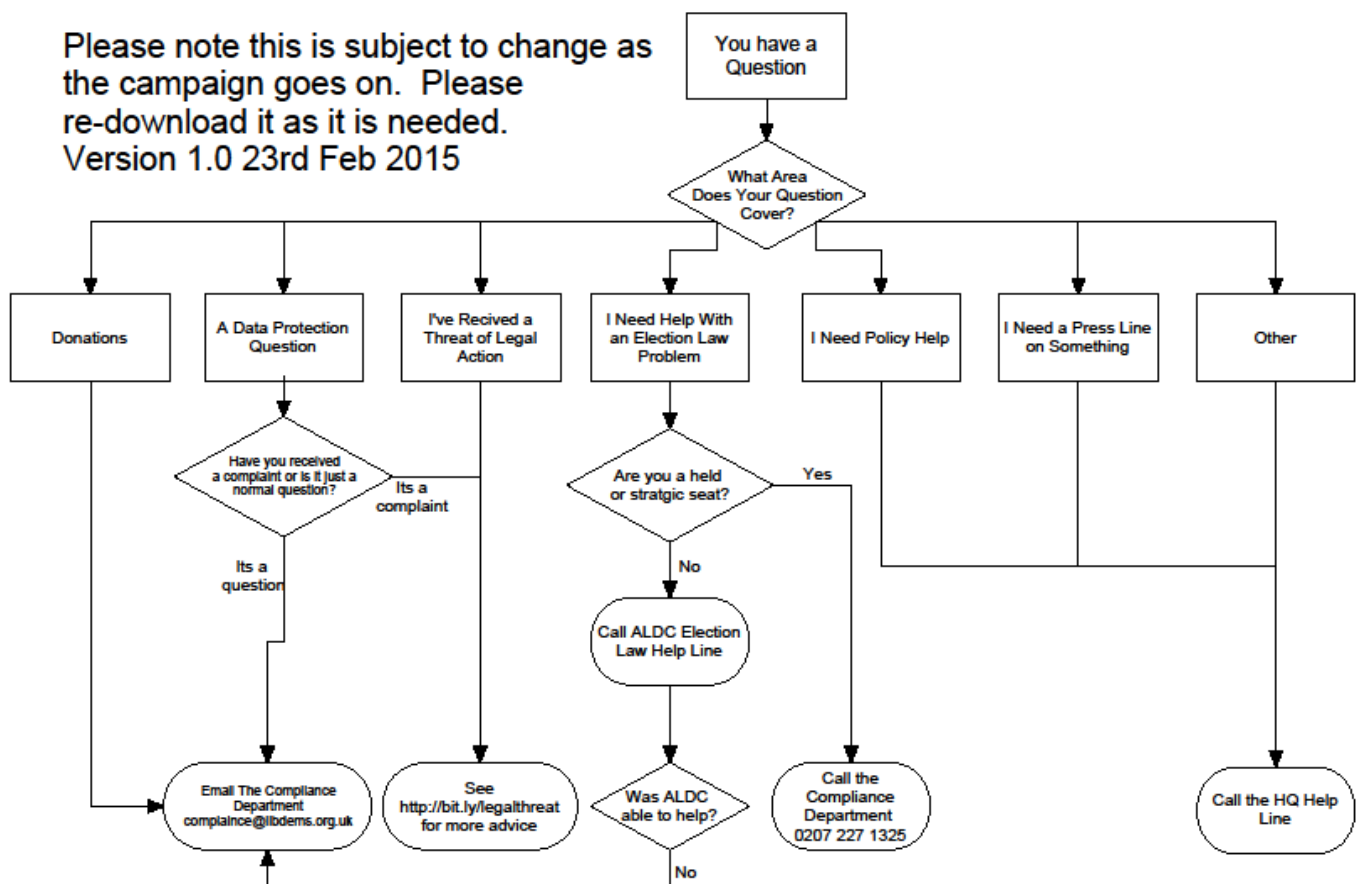
4.3 Any campaigner who has actual evidence that an electoral offence has been committed should report it directly and without delay to the police.

If appropriate, the police will investigate the matter. Every police force has designated a Single Point of Contact (known as a SPOC) to lead on election matters and who will deal directly with the matter or give advice to local police officers. The Electoral Commission can help provide contact details for local police force SPOCs.

Who to contact if you have a problem

Here is the official flowchart from party HQ for the 2015 general election.

If it is updated, the new version will be placed in the Google Drive, which agents are given access to after telling HQ's Compliance Department of their appointment.



How to respond to any legal threats

Here is the official flowchart from party HQ for the 2015 general election.

If it is updated, the new version will be placed in the Google Drive, which agents are given access to after telling HQ's Compliance Department of their appointment.

