

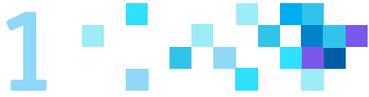
Alberta School Boards Association

# Campaign Manual



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# Introduction

## Congratulations on deciding to run for school board trustee!

If you are a new candidate, congratulations on making the leap into electoral politics. If you are running for re-election or you have run before, congratulations on seeking community representation once again.

You are taking the first step in an important democratic process. Our school boards are important decision-making bodies, and your desire to take part in this process is crucial for their democratic function.

This manual can be used as a resource when planning your upcoming campaign. This document contains some of the key tactics and considerations necessary for developing a successful campaign.

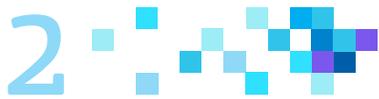
Elections are built on finite resources: time, people and money. These elements are important to consider when planning your campaign. How you utilize them effectively will likely determine your success.

We look forward to seeing you on the campaign trail and wish you the best of luck in the election!

## Key Dates<sup>1</sup>

<b>Dec. 31, 2020</b>	■	Deadline to pass a bylaw to specify minimum number of electors to sign nomination of a candidate for office, deadline to establish one or more locations where nominations can be received
<b>Jan. 1, 2021</b>	■	Nomination Period Opens
<b>May 1, 2021</b>	■	Start of “election advertising period” in which local jurisdictions must maintain a register of third parties who engage in election advertising
<b>June 30, 2021</b>	■	Deadline for municipalities/divisions to appoint Returning Officers, deadline to pass a bylaw allowing RO to designate more than one voting station for each subdivision
<b>July 1, 2021</b>	■	Earliest date a municipal/school employee wishing to be nominated may notify the employer that they are taking a leave of absence
<b>Sept. 20, 2021 12:00 p.m.</b>	■	Nomination Period Closes
<b>Sept. 21, 2021 Until 12:00 p.m.</b>	■	Candidate may withdraw their nomination in writing, in person
<b>Oct. 16, 2021</b>	■	Last Date to hold and advanced vote if applicable
<b>Oct. 18, 2021</b>	■	Next Election Day
<b>Oct. 20, 2021 Until 4 p.m.</b>	■	Deadline to Receive a request for a recount
<b>Oct. 22, 2021</b>	■	Recounts must be complete
<b>Nov. 6, 2021</b>	■	Last day for an elector to request a judicial recount

<sup>1</sup> 2021 General Election Checklist and Calendar, <https://www.alberta.ca/assets/documents/ma-election-checklist-calendar.xlsx>



# Deciding to Run

## Why do you want to run?



While this may seem like a straightforward question – the answer is not always obvious. Before you start your campaign, make sure you have an answer. Think about what motivated you to run in the first place. Be confident and genuine when answering the question.

Your response should also be clear and appeal to voters. You must have an issue or rationale for running in your community. Make sure every voter knows what that “something” is. A good way to frame this is by tying your statement to an experience or narrative. You should consider how you frame your campaign and what policies to address. It is important to avoid being a single-issue candidate.

People need to trust you and trust your vision before they are comfortable voting for you. Voters have to know you, like you, and relate to you, to take the next step and vote for you.

Be accessible! Share your story, vision and background with your target audience. Highlight life and work experiences that are relevant to your platform and goals. Employ diverse types of media to your advantage, catering to the individuals who are most likely to vote for you. Use anecdotes, stories, photos, videos and testimonials that feed your campaign message. As well, you should anticipate your area of vulnerability or weakness. Bite the bullet and address any vagueness or potential questions your target audience may have.

Most of all, it is important to be authentic. Voters can tell when you do not mean what you say. It is important to convey honesty and truth through your message, admit faults (such as a promise not kept or an unreturned phone call from a constituent) and be as genuine as possible. Voters are smart and you should ensure they see the most authentic “you” possible.

## What to do as a Candidate

The Candidate has three jobs during the campaign:

1. Make a meaningful impression on voters, convince undecided voters to vote for you.
2. Raise money (if required).
3. Recruit Volunteers.

Given the limited resources a school trustee campaign may have, it may make sense for you to take on some campaign management roles as well. If the campaign has a volunteer campaign manager, these should be the **only** activities a candidate is doing leading up to election day. Candidates should be interacting with voters at every possible opportunity and speak directly with as many of them as possible.

2 Local Authorities Elections Act (2020), <https://www.qp.alberta.ca/documents/Acts/L21.pdf>

## Are you eligible to run?

There are five key requirements you need to take into consideration when confirming your eligibility to run. Review these requirements before planning for your campaign and submitting your nomination papers. These requirements are outlined in the **Local Authorities Election Act and the Education Act**.<sup>2</sup>

1. You must be eligible to vote in the election. You have to be a Canadian citizen and must be at least 18 years of age.
2. You must be a resident of the local jurisdiction, for the six consecutive months immediately preceding nomination day. Refer to the Local Authorities Election Act (LAEA) for more details.
3. You must be a resident in the school division. According to the LAEA, a candidate for trustee of a board of a school division that is wholly or partly within the boundaries of a city is not required to be a resident of the ward but must be a resident of the school division.
4. Some faith-based and francophone school boards have specific requirements to run for their school board. Reach out to ASBA or to the school board you are considering running for to find out specific requirements for that election.
5. You should not be otherwise ineligible or disqualified. You would be considered ineligible if you are the auditor of the local jurisdiction. Secondly, you must not be an employee of the school board for which the election is to be held unless you take a leave of absence. This includes a school division, a charter school or a private school. Thirdly, you need to ensure that you do not owe the municipality for taxes in default exceeding \$50. In addition, you should confirm that you do not owe the local jurisdiction for any debt exceeding \$500 and are not in default for more than 90 days. Lastly, you cannot have been convicted of an offence under the LAEA, the Election Act, the Election Finances and Contributions Disclosure Act or the Canada Elections Act within the last 10 years.

### KEY TERM

**Local Authorities Election Act (LAEA):** The legislation that governs all municipal elections as well as those for school board trustee positions.

If you are unsure about any of the above, refer to the 2021 School Board Elections Information Package. You will be able to find more details that may find helpful.<sup>3</sup>

## Where do you Start?

Once you have decided to run, it is time to get your name on the ballot. The first step for any candidate is to complete the nomination package.

To complete your nomination process, each local school board or municipal elections authority will have their own set of forms and requirements for you to complete. Standard across the province, candidates will have to complete the required “*Form 4 – Nomination Paper and Candidate’s Acceptance*” as well as “*Form 5 – Candidate Information*.” These forms can be accessed via your local returning officer, municipal elections authority or school board. You can find out the best method of contacting your local returning officer via your school board or local elections authority. These bodies will appoint this individual for the duration of the campaign. It is important to be exceptionally diligent when completing these forms and ensure all information that is submitted is correct. Please note that municipalities have varying requirements for these forms, including how many electors are required to have signed the form to validate your nomination.

To avoid any pitfalls in the nomination process, we suggest submitting your nomination forms as early as possible before the nomination deadline to ensure it is complete. We would also recommend having more electors sign your forms than needed for your nomination to guarantee you reach the minimum requirement. In most cases, signatures need to be collected in-person. You can inquire with your local returning officer or municipal elections board about the types of signatures that will be accepted on the form, including signatures obtained via e-mail.<sup>4</sup>

<sup>3</sup> 2021 School Board Elections | Information Package, <https://education.alberta.ca/media/3795940/2021-school-board-elections-information-package-october-2020.pdf>

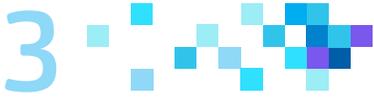
<sup>4</sup> 2021 School Board Elections | Information Package, <https://education.alberta.ca/media/3795940/2021-school-board-elections-information-package-october-2020.pdf>



Once completed, you must submit the forms appropriately as per LAEA guidelines. According to the LAEA, individual school boards can adjust how they receive nomination papers from school board trustees. All nomination packages must:

- Be signed by at least five electors or more (check with your school board/local municipal elections authority for additional requirements);
- Have a valid deposit (check with your school board/local municipal elections authority if this is required and your deposit total);
- Be signed and affirmed by the candidate (check with your school board/local municipal elections authority if there are any additional signing/affirmation requirements).

In addition to having the correct deposit value, some elections authorities require specific methods of payment. Make sure you check with your local returning officer or municipal elections authority which methods are valid in advance of you filing your nomination papers.



# Campaign Activities

## At the Door or On the Phone

As a candidate, you have many responsibilities to undertake throughout the course of your campaign. However, your main priority should be engaging as many voters as possible before election day. This requires you to obtain a list of electors (one that you generate yourself going door-to-door, purchased from a data provider or one you receive from your municipal returning officer) to allow you to reach out and keep track of voters you have met.

Do you have an elevator pitch ready? Create a short script that you can deliver to voters which answers the following questions:

### 1. Who are you?

Share your name. Introduce yourself and your goals.

### 2. What are you running for?

Some people may not be aware of an upcoming election or what the role of a school board trustee is. Provide those details to your voter in a concise way that does not inundate, especially if it is your first encounter with the voter.

### 3. What do you need?

Ask if you can count on their support on election day. While this may seem too bold of a question to ask when concluding the conversation, it is essential. If the voter did not know about the election and is impressed by your pitch, they can be swayed and give you their support. This is a great way to leave a good first impression. It creates a solid foundation for a relationship with your voters.

Speaking to people, whether in person or on the phone, helps gauge how many people support you. It will help you and your team understand which of your priorities resonate with voters. You will also get a better sense of which issues voters would like to see improved or fixed. Comprehending these points and making the necessary changes to your campaign and platform will show voters that you are listening to them and that their input matters.

## Recording Voter Data



Documenting and recording voter intentions are essential elements of a campaign. Making lists of your supportive voters is the easiest way to do that. Persuade and explain why they should support you and not another candidate. Above all, call on people to exercise their right to vote.

Recording data is a crucial part of the election process. The list of electors will indicate who your voters are and where you can reach them. Not all municipalities will provide lists, so you might have to contact your returning officer to see if an electors list is available. You may also have to reach out to a data provider for a list or create one yourself. Before doing so, confirm that you are allowed to use this list for trustee elections. Do not be afraid of the possibility that you may need to start from scratch. You may have to create your own list using a spreadsheet, data management software, or on paper, inputting voter IDs as you go. Remember that some voters may not be on your list and that literature left at a voter's door may be the only method to reach them.

Moreover, you should work to compile the acquired data into a single database so that everyone on your team is on the same page. As mentioned above, the easiest and most accessible place this can be done is on a computer or using a written chart or table. If using a computer, secure the file with a password and make sure that the only people with authorization are you and your team. Review any applicable privacy laws in Alberta to see how you are supposed to store and/or destroy the list of **voter IDs**. You can find out more about national privacy laws from the Office of the Privacy Commissioner of Canada.<sup>5</sup> You can also ask your local returning officer what steps must be taken to maintain voter privacy through the course of your campaign.

If you are having trouble figuring out where to start your outreach, look at how voter turnout patterns for elections in the past. Your municipal elections authority may have past data that you can access. When in doubt, look at where turnout was the highest in previous elections and start from there.

Additionally, it is important to know which information is valuable enough to record. Not everything you discuss with voters is worth documenting. These are the questions you should be recording answers to:

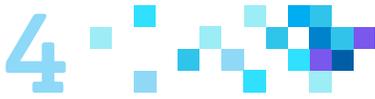
1. Were you able to reach the voter?
2. Who are they supporting? This will help you figure out who to target on election day.
3. What is their name?
4. Where do they live? What is their address?
5. If applicable: Are they willing to make a public endorsement? (e.g., putting up a lawn signs, posting on social media, etc.)

At the very least, when you are canvassing, write down the voter's name and address, so you can keep track of their name on your spreadsheet, written table or other tracking form. This list of identified supporters is your key to getting out the vote on election day.

### KEY TERM

**Voter ID:** In the context of campaigning, it is the identification of the voter to a particular candidate, political party or point of view. This data can be collected and used to determine the priority of approaching them to come out and vote for you on election day.

<sup>5</sup> Local Authorities Elections Act (2020), <https://www.qp.alberta.ca/documents/Acts/L21.pdf>



# Reaching Voters

There are five main ways to reach voters. Each method has its advantages of helping you connect and understand the people on whom you rely to win.

## Door to Door Canvassing

Door-to-door **canvassing** is arguably the best and most effective way of acquiring voter identifications. This allows you to collect the most amount of data about who voters are supporting and what their intentions may be on election day. It is also a great way to create an in-person connection, giving them the opportunity to get to know you and understand what you can do for them.

Unfortunately, the COVID-19 pandemic makes this more challenging. You should be canvassing in a way that does not put you or anyone in your community at risk. If your community would not look favourably on your canvassing in-person, do not do so. You can use other methods of engagement with voters.

Door knocking for **“Get out the Vote” (GOTV)** has been shown to increase voter turnout, so take advantage of your conversation with your voter. Ask where, when, how and who they plan on voting for. Going over the logistics (where, when, how and who) will ensure people have somewhat of a plan in mind come election day. Also, being the person who helps them come to these conclusions may work to your advantage.

It is important to understand why doing door-to-door canvassing is required to garner voters and their support. Going door-to-door canvassing allows you to meet individual voters and gather data. When trying to understand a voter’s preferences it is definitely best to do it face-to-face. You are able to engage with the voter on a more personal level, and that way they can find themselves comfortable enough to engage with you and your campaign.

To begin this process, select an area to canvass. It does not matter if it is one street or a few. Starting with a street that you recognize or even live on, will help you get rid of those nervous jitters. If no one answers any of the doors

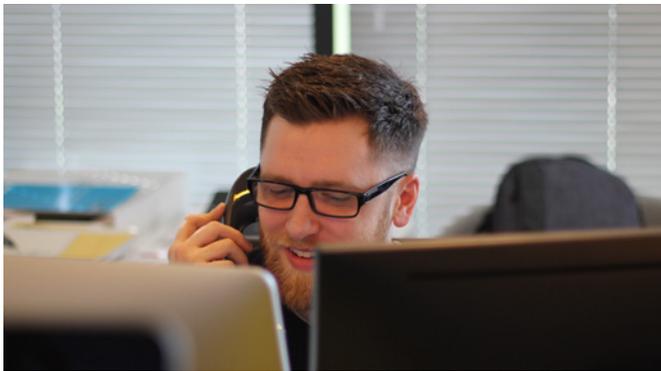
### KEY TERM

**Canvassing:** Typically, going door-to-door to help identify and solicit support from voters. You can canvass as an individual candidate or with volunteers. You can also canvass over the phone in what is called a “phone canvass” or if multiple people are participating a “phone bank.”

### KEY TERM

**GOTV:** Acronym for “Get Out the Vote.” This is a term for all your efforts in the lead-up to election day to increase voter turnout for your campaign.

you approach, make note of it for the next time you go door-to-door. If they do answer, introduce yourself, let them know you are campaigning to be a school board trustee in their ward or division, and ask if they are willing to support you. Once you have the information you need, make note of it. Let the conversation flow as naturally as possible and answer any questions. Share any literature you are carrying and thank them for their time. Each interaction should take no more than one to two minutes. The more confident you are, the better the connection with the voter will be. It may take a few attempts before you are comfortable with the process.



## Phone Canvassing

Another way to reach a voter is via the telephone. This method is not as effective a way to achieve a personal connection with voters compared to door-to-door canvassing but may be the only safe and accessible way to do so during the COVID-19 pandemic. Keep in mind that you might not always be able to reach the voter for multiple reasons whether it be because they have disconnected their phone line, they do not answer numbers they do not recognize or they are just not in a setting where they can answer the phone and chat for a few minutes. On the phone, it is significantly harder to sound sincere and confident than in person. People cannot see your body language or facial expressions, so your tone and words become their image of you (that is if they have not met or seen you before).

Despite these drawbacks, phone calls are an efficient means of reaching people. It is one of the fastest ways of connecting with voters. The awkwardness of meeting

people for the first time is diverted because you are better able to mask any hesitancy you may be feeling. Phoning does not require the same time commitment as moving from door to door, but instead, you are connecting with people from the comfort of your office or home. Considering the COVID-19 pandemic; phone canvassing avoids putting yourself or any voters at risk by going door-to-door and meeting many people one right after the other.

You should use a call sheet or a voter registration list to keep track of who you are calling from each area. This works best if you have a script that you can follow.

An example of a script to help you map out the call might look like this:

1. Hello, may I speak with [Voter's Name]? My name is [First Name] and I am campaigning to be the school board trustee in [Ward/Division].
2. I wanted to know if I can count on your support on election day.

Like a conversation at the door, this call should not take more than a few minutes, so getting across the points of who you are and why you are calling is key. Once you have the answer to the second point, make sure to record it. If the conversation allows it and the voter wants to know more about you, your campaign, or the election in general, take this opportunity to sell your message. At the end of the call thank them for listening and ask if they have any questions.

In the case that no one is home, or that no one answers, skip the number altogether and come back to it once you are done with the full list. Avoid leaving voicemail messages. Be sure to not block your phone number and follow **CRTC** regulations on phone calling for political campaigns. These regulations are available on the CRTC website.

### KEY TERM

**CRTC:** Acronym for Canadian Radio-television and Telecommunications Commission. They set the standards for all broadcast and telecommunications across Canada. You can find out where to find telephone rules relating to elections in the "Resources" section of this manual.

## Campaign Literature



You can effectively reach your voters at a distance through literature like pamphlets and leaflets. Make sure your literature is made of durable (and ideally sustainable) material and is the right size to fit in home mailboxes or can bend and fit into a door handle. It is arguably safer, given the current pandemic, and it is fairly inexpensive.

The main problem with literature is that the information on the flyer may not be retained, unless reviewed multiple times by the voter. Regardless of this, you can take advantage of the fact that many people are staying at home right now. In your literature make sure to include the logistics of election day. When are people voting and who are they voting for? Include some information about yourself as a candidate, your platform and your contact information. The literature should be to the point. As well, it should be eye-catching enough that the voter will want to pick it up and read it.

To summarize, good literature follows these three simple points:

1. Visually attractive
2. Brief
3. Conveys key messages

The probability of someone looking at your flyer for more than a few seconds increases if you follow these three guidelines.

## Online Events and Social Media

The fourth method to expand your outreach includes hosting webinars, community events or debates. Talk to your campaign volunteers (if you have recruited any to support you) throughout your campaign and have them reach out to their network. Schedule as many meet-and-greets as your time will allow. Take advantage of the digital world we are living in and utilize the available tools. This can help you target niche audiences that you are not necessarily able to connect with via other methods. Message Facebook groups that include your target audience and suggest hosting an event with their help to extend your outreach. Look into participating or even organizing debates with other candidates that people can watch live. Consider recording your virtual events and then uploading them to a YouTube channel created for the purpose of your campaign. That way, you are able to post the videos to your other social media platforms on the Internet.

Additionally, you should create a schedule for each event. It might be helpful, depending on the style of the event, to have a moderator to assist with conversation flow. Make sure to introduce yourself and your message at the beginning of the event. If the event is not a debate or a discussion between two candidates, focus the event on a topic or issue that you have plans to improve. This will allow people to understand your plans and policies, while also providing voters the opportunity to share their thoughts and opinions.

This method is the cheapest way to reach voters. Above all, show that you are engaged in your community and advertise your event before it takes place. This can be as simple as posting about it on your social media. After the event, make sure you thank people for watching and include a link to the recorded version of the event or a segment of it that they can access.

Another tool you can use to raise awareness about your campaign is social media. Create profiles that revolve around your new campaign or use your personal accounts. Make sure your social media outreach spreads to platforms such as Facebook, Twitter, and Instagram. Use this tool to your advantage. It is a great way to connect with



your community. Show its members that you care about what they have to say and that you are listening to them.

Nevertheless, caution is always advised. Anything you put on the Internet is permanent even if you delete it. Double, even triple check your comments and posts. A good way of circumventing issues that might arise from spontaneous posting is creating a content calendar for each month, that way you can plan strategically. It is a great way to show people how you are campaigning and how you are connecting with the community. Marketing your campaign on social media is free. Be aware of any social media reporting requirements, such as Facebook's Issues and Political Advertising requirements.

## Lawn Signs

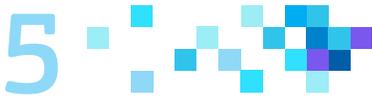
Another way of connecting with your audience is via signs. Lawn signs can be expensive. You will have to go to a professional, unless you have the resources and skills to create your own. These signs are catered more towards voters who are not too familiar with the election or even you or your campaign. It is an effective way of catching the attention of people in your community. Make sure you place your signs where it is legal according to your municipality. Remember that other methods of personal voter interaction may be a better use of your time. The essential rule about signs is that they do not vote. You could feasibly have the most signs in your ward or division, but no one to vote for you if you have not reached out to

them. Spend more of your finite resources on engaging with voters directly to spread your message.

Once completed, you must submit the forms appropriately as per LAEA guidelines. According to the LAEA, individual school boards can adjust how they receive nomination papers from school board trustees. All nomination packages must:

- Be signed by at least five electors or more (check with your school board/local municipal elections authority for additional requirements);
- Have a valid deposit (check with your school board/local municipal elections authority if this is required and your deposit total);
- Be signed and affirmed by the candidate (check with your school board/local municipal elections authority if there are any additional signing/affirmation requirements).

In addition to having the correct deposit value, some elections authorities require specific methods of payment. Make sure you check with your local returning officer or municipal elections authority which methods are valid in advance of you filing your nomination papers.



# Candidate Pitfalls

Ensuring your campaign runs smoothly means avoiding common pitfalls that can hinder your ability to execute an effective campaign. Here are some potential pitfalls to consider as you organize your campaign:

## Social Media

Social media can be both a helpful tool and a potential pitfall as you engage in your election campaign. Social media can be incredibly helpful in reaching your network and broader community and can allow you an opportunity to craft specific messages for voters in advance of the election. That being said, the most common rule on the internet is, “if it has been posted, it is there forever.” Keep this in mind when you are posting in the lead-up to your election and consider how to craft your message effectively. The “Golden Rule of Social Media” is to think before you post. Ask yourself: “Would my religious leader or someone I look up to be comfortable with me posting this? Would my parent/grandparent be comfortable seeing what I am about to post?” If the answer is no, **do not post**. This same rule applies to posts you may have made in the past. If you believe that the answer to these questions is “no” about a previous post you have made; it may be wise to consider how you will respond should you be asked about it.

## Finances

Campaign finances can be complicated. While the Local Authorities Election Act (LAEA) changes have now standardized requirements across all school trustee elections in terms of what needs to be filed (all candidates are now required to file disclosures with your local elections authority or school board), these may be complicated and challenging to complete, especially for first-time candidates. The easiest way to prevent any mishaps when it comes to financial disclosure is to **keep accurate records**. That means ensuring that you keep **all** receipts on items that are considered “campaign expenses”<sup>6</sup> and ensure

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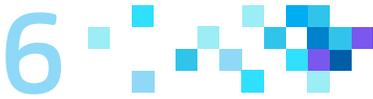
<sup>6</sup> See the latest version of the LAEA for the definition of a campaign expense. Local Authorities Elections Act (2020), <https://www.qp.alberta.ca/documents/Acts/L21.pdf>



that you keep a record of all donations you receive over \$50. This can be kept electronically (make sure you have this backed up) or in paper form. It is also important to ensure that your disclosure is filed on time to avoid being fined.

If you receive contributions, make sure you accept them properly. New LAEA amendments require campaigns that accept contributions (including self-funded campaigns) over a threshold of \$1,000 to apply to open a bank account.

Campaigns, especially smaller ones, often have limited budgets. Make sure from the outset you have a budget that you believe is reasonable for your circumstances and that you can pay any outstanding debts at the end of your campaign with either contributions or self-funding within the legal contribution limits. If there are spending limits put in place by the government in advance of the election, it is incredibly important to abide by them.



# Get Out the Vote

Executing your campaign hinges on your ability to effectively and efficiently get your supporters to the ballot box.

There are some considerations to keep in mind when getting out the vote (GOTV) on election day:

## COVID-19 and GOTV

In Alberta, municipal election day has historically taken place on a Monday with special ballots only being allowed for those who are disabled or outside the jurisdiction on the day of the election. In the lead-up to the October 2021 municipal elections, it is important to monitor if the government makes any rule changes to allow for special ballots or an increased number of polling days. This can determine how you campaign, including if you need to activate your GOTV strategy over a number of days and encourage registration for special ballots for those unable or unwilling to go to the polls. If special ballots are allowed, expect them to be used heavily. For example, in the Newfoundland provincial election that took place in February, special ballot applications were up approximately 900% (as of January 2021) in advance of the election.

## Keys to GOTV

The key to GOTV is to utilize the data you have collected throughout the campaign period and encourage those who are supporting you to get out to the polls. That is why collecting data and understanding who is going to vote for you is crucial; it allows you to direct your finite resources on election day to where it matters most: your supporters.

In advance of election day, it is important to filter and identify your most supportive voters. If they previously expressed support for you on a phone call, on their doorstep, asked for a sign or made a donation, they will probably support you on election day. Make sure you identify from your data all those individuals and prioritize them for outreach on election day.



You should ideally provide multiple prompts for voters to get out and vote for you on election day. This can be in the form of in-person interaction (if allowed), over the phone, online or via a piece of election day literature. If possible, on election day, you want to engage with your supportive voters on multiple occasions and remind them to get out to vote for you.

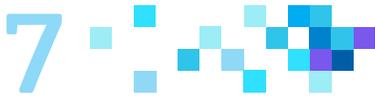
It is important to be persistent in your GOTV efforts. Every vote matters and encouraging those to get out to vote can make or break a close election. Engage with voters throughout election day. You should encourage those who are willing to volunteer for you to do so on election day if they are available.

## Schedule a time to vote

Research shows that creating a voting plan increases a voter’s likelihood of voting on election day.<sup>7</sup> On election day, and in the week leading up to election day, when you are interacting with a voter, you should remember to ask them when and where they are going to vote.

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<sup>7</sup> Source: Nickerson & Rogers. Do You Have a Voting Plan?: Implementation Intentions, Voter Turnout, and Organic Plan Making. Psychological Science (2010)



# Campaigning & Covid-19

COVID-19 has brought about significant changes to our daily lives, including aspects of campaigning. “Shaking hands and kissing babies” has always been a staple of campaigning. In the past, in-person contact with voters has been considered “essential” for a successful campaign.

With much of the in-person aspects of campaigning likely curtailed due to COVID-19 restrictions, it will be important to utilize the existing aspects of campaigning that do not require in-person contact as well as creating ways of replicating in-person events safely. Many of the recommendations may not suit your campaign style, budget or ability. Local health measures in Alberta may restrict you from undertaking many of these activities during the campaign period. Voter comfort may restrict attendance, or limit their desire to participate and engage with you in-person. The COVID-19 pandemic has taught us the importance of being flexible and willing to adapt quickly.

Feel free to use these suggestions and tips as a guide when you organize your campaign in a COVID-19 safe manner:

## Think digital and at a distance

The safest method of contacting your voters is from six feet away, or even further. Campaign tactics which allow you to engage voters from a distance include:

- Phone calls
- Online events
- Literature drops

All three options would be activities to consider during a regular campaign but can be easily executed safely from a distance.

### Phone Calls

Although not as effective as meeting a voter face-to-face, phone calls still allow you to engage voters directly and speak about issues that may concern them. With most individuals isolated at home, people are yearning for more connection and are eager to engage in conversation.

## Online Events

Online events can be easily executed on Zoom or other video conference platforms. Most of these platforms offer free options and can hold between 50 and 100 participants at a time. It is important that if you are hosting an online event that you incorporate structure. This might require having a separate host to help field questions and deal with logistics while you focus on engaging with voters directly. As well, a set (although not necessarily published) agenda is necessary to keep people engaged and the discussion focused.

If you are looking to keep people engaged, particularly volunteers, friends or neighbours in a less-formal setting, conducting an activity or playing a virtual game can help keep people interested throughout your event. Politicians across the country have completed virtual wine tastings, cooking events or trivia contests to help raise “funds” and “friends” during the pandemic.

## Literature Drops

Literature drops are exactly as they sound: namely, leaving campaign literature in a voter’s mailbox. They are easy to organize, and require little effort and little contact. They can help you reach voters quickly and communicate your priorities in the absence of a face-to-face discussion.

## Read the Community You Live In

COVID-19 has come in waves across the province, and numbers are likely to continue to fluctuate throughout the campaign period. While we do not know what the situation will be like over the coming months, it is important to “read the mood” of the community you are looking to run in, to understand what would be considered acceptable levels of in-person contact.

As a trustee candidate, you will likely understand how the community feels about in-person events and contact. While some may be willing to engage in in-person contact, it is important to be respectful and understanding of those who do not. Adapt your campaign strategy to engage these voters and look at alternative ways to reach them.

No matter how you may feel about in-person contact, it is important to respect the wishes of others and read the feelings of the broader community.

## Public Health Guidelines

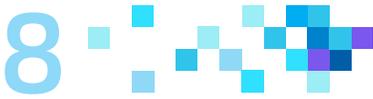
The most important rule of campaigning in a pandemic is to **OBEDIENT PUBLIC HEALTH GUIDELINES**. Go above and beyond what’s expected of you to comply with guidelines and the advice of public health experts. Additionally, it is important to demonstrate to voters that you are abiding by the rules and that you care about the well-being of the community you live in.

## Use Social Media as a Tool

Social media can be a great way to reach voters across your constituency. Your community may have a Facebook group, parents’ group or neighbourhood association. Utilize these platforms to reach local parents and potential voters directly and allow them to engage with you on questions related to your platform or concerns they may have with the school board. It is important to be open and flexible online and ensure that you abide by the previously mentioned recommendations on social media etiquette. Always remember: once it is online, it is there forever.

## Adapt Events at a Distance

Should public health guidelines allow, and your community mood permits, adapting in-person events to minimize contact can be done. Moving events outside and keeping people apart are great ways to adapt a previously indoor event such as phoning supporters or going door-to-door canvassing. As well, using outdoor spaces on election day such as a garage or front lawn can allow people to engage with you and get out the vote at a distance.



# Local Authorities Election Act

## Changes from 2018 and 2020<sup>8</sup>

See below a list of recent changes to the Local Authorities Election Act (LAEA) that are important to consider when organizing your campaign:

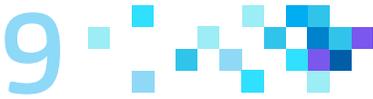
TOPIC	OLD RULE	NEW RULE
<b>Campaigning at Voting Stations</b>	<p>The LAEA “prohibited the distribution of pamphlets and materials inside the voting station as well as the display of these materials on the inside or outside of the voting station.”</p> <p>The LAEA, however, did not prohibit the distribution of materials outside of a polling station building or around a station</p> <p>The LAEA also allowed for a deputy returning officer to remove the signage or materials and was not liable for trespassing.</p>	<p>The LAEA extends the prohibition on campaign activities and advertising to “within the boundaries of land on which a building is located for the use as a voting station.”</p> <p>Candidates cannot solicit votes or communicate for the purpose of soliciting votes around the voting station.</p> <p>The returning officer may request or instruct that campaign advertising be removed and those obstructing the voting process or campaigning to leave the property.</p> <p>Candidates must ensure that they refrain from these prohibited activities; a candidate that partakes in activities that can be considered an attempt to influence votes may be fined up to \$500.</p>

<sup>8</sup> Implementation fact sheets: Local Authorities Election Act, 2018 and 2020, <https://open.alberta.ca/publications/implementation-fact-sheets-local-authorities-election-act-2018-and-2020>

TOPIC	OLD RULE	NEW RULE
<b>Campaign Financing</b>	<p>LAEA finance rules did not apply to school boards and school boards could set their own disclosure and surplus rules.</p> <p>Candidates were required to disclose donations over \$100.</p> <p>Candidates were not required to have financial statements audited or reviewed prior to filing disclosure statements.</p> <p>If your campaign was self-funded, you did not have to file disclosure statements.</p>	<p><b>All LAEA financial provisions apply to school board trustee candidates.</b></p> <p>Candidates are now required to disclose names and addresses of donors who donate <b>over \$50</b>.</p> <p>A candidate who spends campaign expenses or contributions of over \$50,000 must file a review engagement via an accountant with their disclosure statements.</p> <p>Financial disclosures are required from <b>all</b> candidates including those who are self-funded.</p> <p>School Boards are no longer able to set their own disclosure and surplus rules, they must follow those in the LAEA. Contact your school board to ensure compliance.</p>
<b>Corporate and Union Donations</b>	<p>The LAEA previously allowed campaign donations from corporations, trade unions, and employee organizations.</p>	<p>Only individuals ordinarily residing in Alberta may make campaign contributions.</p>
<b>Individual Donation Limits</b>	<p>The LAEA previously set a \$4,000 donation limit.</p> <p>Candidates were also restricted to a \$4,000 limit towards their own campaign.</p>	<p>Candidates can contribute up to \$10,000 of their own funds for the purpose of their campaign. It is the responsibility of the <b>donor</b> to ensure they are not prohibited from making a donation in excess of the \$5,000 limit.</p>
<b>Campaign Spending Limits</b>	<p>Not addressed in the legislation.</p>	<p>The Minister of Municipal Affairs may make a regulation setting a spending limit. School boards may set a lower limit via a bylaw.</p> <p>There are currently no regulations in place, but the Minister has the prerogative to set one if he/she chooses in advance of the election.</p>
<b>Bank Accounts</b>	<p>Required that a candidate open a bank account once total contributions exceeded \$5,000. Self-funded candidates were not required to open an account.</p>	<p>Requires that <b>all candidates, including self-funded candidates</b> open a bank account when at least \$1,000 in contributions is received, including self-funded contributions. If your contributions do not exceed \$1,000, you do not have to open an account.</p>

TOPIC	OLD RULE	NEW RULE
<b>Nomination Day</b>	<p>Nomination day was defined as four weeks prior to election day, between 10am and 12 noon.</p> <p>The LAEA defined ‘campaign period’ as being the period beginning January 1 immediately following a general election to December 31 following the next general election.</p> <p>A candidate had to register with the municipality in which they intended to run prior to accepting campaign contributions. Registration could occur at any time over the four-year campaign period.</p> <p>School Board Trustee candidates were exempt from these requirements as boards could set their own campaign finance rules.</p>	<p>Nominations are now accepted at the beginning of the campaign period (January 1st in the year of an election) until 4 weeks prior to election day at 12:00 noon.</p> <p>Candidates are required to be nominated in the school board in which they intend to run prior to incurring campaign expenses or accepting campaign donations.</p> <p>Candidates can accept contributions outside of the campaign period to a limit of \$10,000 annually (their own funds) and \$5,000 aggregate annually from other donors.</p> <p>Once their nomination has been filed and accepted they can begin to accept contributions. Candidates cannot incur any campaign expenses until they have been nominated.</p>
<b>Surplus</b>	<p>Candidates who identified a surplus when filing their disclosure were required to turn the surplus over to the municipality to be held in trust. Candidates would have this returned if they ran again.</p> <p>If they chose not to run, the candidate, within six months, was required to choose a charity and donate the surplus.</p>	<p>School board candidates are required to donate surpluses in excess of \$1,000 to a registered charity within 60 days of filing their disclosure. Candidates must donate an amount that results in the surplus being less than \$1,000.</p> <p>If they have a surplus under \$1,000, they may retain it or donate it.</p> <p>Candidates must file an amended disclosure statement showing that the surplus has been dealt with to the school board within 30 days of the expiration of the 60-day period.</p> <p>If you have a surplus held in trust from a previous election that is over \$1,000 on September 1st, you must donate an amount to a charity that will result in the surplus being less than \$1,000 prior to January 1, 2022.</p>

TOPIC	OLD RULE	NEW RULE
<b>Deficits</b>	<p>If candidates disclosed a deficit and they were not running in the next general election, they were required to eliminate the deficit within six months of the next election.</p> <p>A personal payment to eliminate the deficit was not considered a contribution.</p> <p>A candidate was required to show via a disclosure that the deficit was eliminated within 30 days of the six-month period.</p>	<p>Candidates are required to eliminate any deficit within 60 days of filing their disclosure. Candidates can accept contributions within the 60-day period to eliminate the deficit.</p> <p>Candidates are still bound by campaign contribution limits while eliminating a deficit (\$10,000 from the candidate, \$5,000 from individuals). Candidates are required to file an amended disclosure statement within 30 days of the 60-day period, showing that there is no longer a deficit.</p>
<b>Campaign Expenses</b>	<p>The LAEA considered campaign expenses to be:</p> <ul style="list-style-type: none"> <li>• The actual personal expenses of the candidate.</li> <li>• The costs of acquiring premises, accommodation, goods, or services used for proper election campaign purposes.</li> <li>• Bona fide payments for the fair cost of printing and advertising; and,</li> <li>• Reasonable and ordinary payment to any person for the hire of transportation used by a candidate or speakers in travelling to and from public meetings, or by any person in connection with and for the proper purposes of an election.</li> </ul>	<p>Campaign expenses are considered any expense incurred, or non-monetary contribution received.</p> <p>The use of goods that were purchased in an election campaign in a second or subsequent election is considered to be a non-monetary contribution. Reusing materials is considered a “non-monetary” contribution.</p> <p>Candidates must ensure that the campaign account is only used for the payment of campaign expenses.</p>
<b>Locations for Filing Nomination Papers</b>	<p>Required that nominations must be filed with the returning officer and local jurisdiction office.</p>	<p>The school board may pass a bylaw in the year prior to the election providing additional locations where a nomination may be received. Contact your local returning officer to see if there are any additional locations or methods for submission.</p>
<b>Nomination Form Requirements</b>	<p>The returning officer must refuse a nomination paper if it has not been signed by five electors and is not accompanied by a deposit if required.</p>	<p>A returning officer is required to refuse a nomination paper if it is not signed by five electors (or more if required), does not have a deposit (if required) or is not sworn/affirmed by the candidate.</p>
<b>Withdrawal of Nomination</b>	<p>A person who filed a nomination may withdraw at any time within 24 hours after the close of the nomination period.</p>	<p>A candidate may withdraw at any time during the nomination period. A candidate may still be eligible to withdraw within 24 hours of the close of the nomination period if there are more candidates than the number of offices being filled.</p>



# Resources

## Local Authorities Election Act

<https://www.qp.alberta.ca/documents/Acts/L21.pdf>

The elections law currently governing School Board Trustee elections in Alberta

## Education Act

<https://www.qp.alberta.ca/documents/Acts/e00p3.pdf>

Lists eligibility requirements, trustee responsibilities amongst other legal requirements for trustees and candidates.

## Implementation fact sheets: Local Authorities Election Act, 2018 and 2020

<https://open.alberta.ca/publications/implementation-fact-sheets-local-authorities-election-act-2018-and-2020>

A series of fact sheets concerning the amendments made to the LAEA in 2018 and 2020, released by the Government of Alberta.

## 2021 School Board Elections | Information Package

<https://education.alberta.ca/media/3795940/2021-school-board-elections-information-package-october-2020.pdf>

A resource published by the Government of Alberta containing useful information applicable for candidate registration and regulations applicable to school board trustee elections throughout the province. This update may be updated regularly.

## CRTC | Rules for unsolicited telecommunications made on behalf of political entities

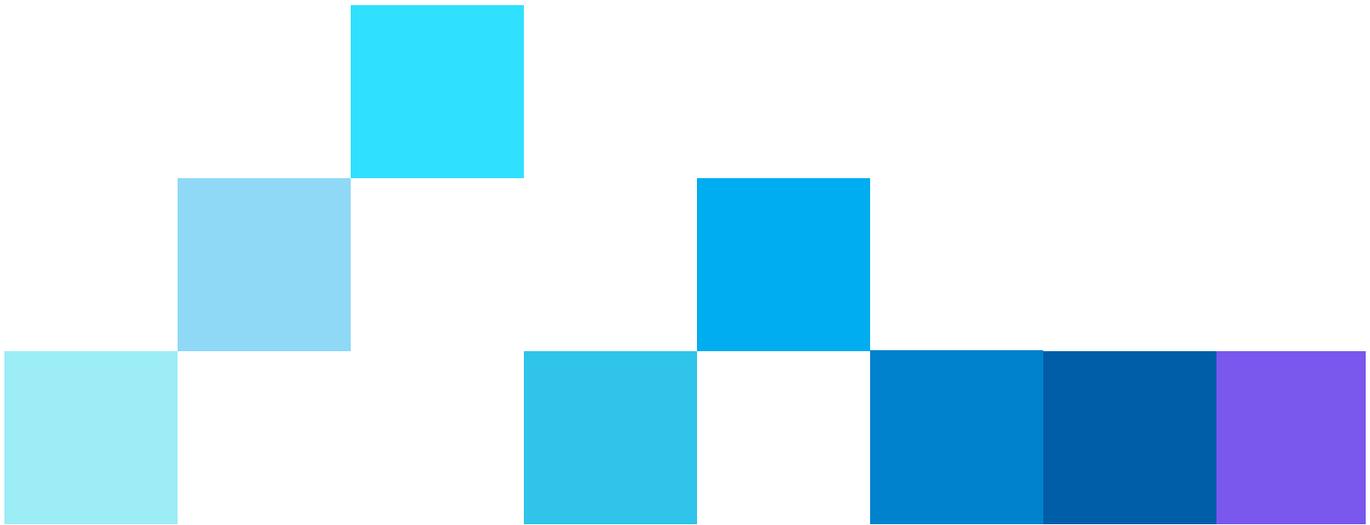
<https://crtc.gc.ca/eng/phone/telemarketing/politi.htm>

Important to review if making phone calls to potential voters.

## ASBA Resources

<https://www.asba.ab.ca/>

Contact ASBA with any questions you may have.



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