

Presidential Election 2022 Guide

This document is guidance created by the Returning Officer for candidates for President.

Accessibility

For those with difficulty reading large volumes of text, we recommend the use of text-to-speech software. There are free options such as balabolka ([available here](#)) and natural reader ([available here](#)). You can also access this document as a google doc by [clicking here](#) and using the Google docs ReadAloud extension ([available here](#)).

A large text format of this document is also available on request at returning.officer@libdems.org.uk.

G01 - Basic information

[Accessibility](#)

[G01 - Basic information](#)

[1. Foreword](#)

[2. Rules for the election in the Constitution](#)

[3. Timetable](#)

[4. Donations and expenses](#)

[Expenses](#)

[5. Data Protection \(part 1, basics\)](#)

[Privacy Policy](#)

[Fair Processing Notices \(FPNs\)](#)

[Sharing data](#)

[Encryption](#)

[Data Breaches](#)

[Storage and Disposal](#)

[6. Data protection \(part 2, Party data\)](#)

[Process for accessing member data](#)

[7. Nomination](#)

[Consent to nomination](#)

[Required member nominations](#)

[Withdrawal from the process](#)

[7.1 Required questions](#)

[7.2 Appointing an agent](#)

[8. Election Address \(manifesto\)](#)

[9. Photographs, Videos and Endorsement guidance](#)

[10. Hustings and candidate events](#)

[10.1 Other Party events](#)

[11. Balloting](#)

[11.1 Count](#)

[11.2 Declaration](#)

[12. Contacting the election team](#)

[13. Making a complaint, raising an issue of concern and self-referral](#)

[Complaints](#)

[Self-referral](#)

[Appendix 1 - Consent forms](#)

1. Foreword

The Returning Officer wishes to draw candidates' attention to the requirement to adhere strictly to the election rules and that nothing is done by candidates or on their behalf by others that would bring the party into disrepute and undermine the election process.

Candidates and their agents are expected to read, understand and comply with this guidance in a timely and thorough manner. Ignorance of the election regulations or the contents of this guidance will not be considered a defence.

Candidates will need no reminding of the need specifically to protect data. The Returning Officer will interpret data misuse, especially misuse of Party and member data, as highly likely to bring the Party into disrepute.

Defamation of fellow candidates is strictly prohibited.

The Returning Officer draws the candidate's attention to his powers under paragraph 19 of the Rules should a breach occur:

21. The Returning Officer shall have the power to disqualify before declaration of the result, or unseat if declared elected any candidate who:

- A. has brought the party into disrepute during the campaign or where the Returning Officer has clear evidence of this happening in the near future; or*
- B. is found to be in breach of any of these regulations,*

but shall not exercise such power without first offering any such candidate the right to make representation, and having regard thereto.

David Crowther
Returning Officer

2. Rules for the election in the Constitution

Common provisions for all elections

1. These regulations set out procedures for the election by all members of the federal party of the Leader, President, Vice President responsible for working with ethnic minority communities, and federal committee posts which are filled by ballots of all party members; and where a decision has been taken to use them for other elections. Paragraphs 2-25 apply to all such elections; subsequent sections apply as identified to specific individual elections.

Organisation of elections

2. The Federal Board shall appoint a Returning Officer to oversee all party elections conducted under these election regulations for a period of three years, or until their resignation, incapacity or death if any of these occur sooner. The Returning Officer shall be responsible for the efficient and timely conduct of these elections. The appointment shall be made at least three months before the Returning Officer's term of office begins.
3. The Chief Executive shall be the Deputy Returning Officer. The Returning Officer and Deputy Returning Officer may jointly appoint Deputy Acting Returning Officers from party members or staff with relevant experience.
4. The Returning Officer may delegate any of the responsibilities set out in these regulations to the Deputy Returning Officer or any Deputy Acting Returning Officer. In any cases of dispute within the Returning Officer team, the decision of the Returning Officer shall be final.
5. The Returning Officer shall ensure that comprehensive written guides and procedures for the use of the Returning Officer team, candidates and voters, are in place for each election at least one month before the opening of nominations in an election. These shall not, thereafter, be amended without good cause.

Timetables

6. The Federal Board shall agree and publicise a timetable for each election, including the publication of the notice of elections, the deadlines to be used for the opening and closing of nominations, submission of candidates' manifestos, despatch and return of ballot papers, and the date for the counting of votes. Once publicised, these shall not, thereafter, be amended without good cause.
 - a. For elections for the Leader, the Federal Board shall agree and publicise the timetable as soon as possible after the vacancy or impending vacancy is announced; and

- b. For all other elections conducted under these regulations, the Federal Board shall where practicable agree and publicise the timetable no later than the spring conference before the elections are due.
7. Once the timetable for any election has been announced but before the opening of nominations, the Federal Board may postpone the election if the timetable conflicts with a general election or a referendum covering England, Scotland, Wales or any combination thereof, or any other situation, such as a public health crisis, that in the Board's view would unduly hinder the conduct of the election.
8. After the opening of nominations for any election, the Returning Officer may postpone or suspend the election if it would conflict with a general election or a referendum covering England, Scotland, Wales or any combination thereof, or any civil or public health emergency, that in the Returning Officer's view would unduly hinder the conduct of the election. If any votes have been cast, the Returning Officer has the power to cancel them and restart the election as soon as the Returning Officer considers practicable.

Conduct of elections

9. The electorate for the purpose of these elections shall be those members with paid-up membership of the Liberal Democrats on the closing date for nominations. Members who, at the closing date for nominations, are in the grace period following their membership subscription due date can be added to the electorate if they renew their membership at least three days prior to the close of voting.
10. All elections will be conducted electronically; this includes the submission of nominations, display of candidates' manifestos and casting of votes. The online voting system shall prompt voters to look at candidates' manifestos prior to voting and provide for the randomisation of the names on the ballot paper.
11. The Returning Officer shall make provision for voters who cannot vote electronically to vote by post upon a request in writing. Any such request shall only be valid for the specific election(s) being conducted at the time of the request.
12. Any official party publication whether in paper or electronic form shall give, as far as possible, equal coverage and a fair balance to all candidates. Coverage of activity by any candidate that is not related to the election may continue in a normal way.
13. Federal Party employees shall maintain strict neutrality from the opening date for declaration of candidacy. It is recommended that employees of state parties, Affiliated Organisations and any other relevant employing bodies shall also maintain such neutrality.

14. Party Officers, acting in their capacity as officers at federal, state, regional and local level, are expected, as far as possible, to give equal opportunities and fair balance to all candidates.

Manifestos and publicity material

15. Each candidate shall be entitled to a personal manifesto to be displayed electronically, in a format to be determined by the Returning Officer. Each candidate shall be responsible for verifying, to the satisfaction of the Returning Officer, any statement in their manifesto claiming that they are endorsed by any individual or organisation. Such material must accompany the candidate's manifesto.
16. In addition to candidates' manifestos, the Returning Officer may decide to require each candidate to provide answers to common questions about their suitability for the position(s) for which they are standing. The Returning Officer shall draw up these questions in consultation with relevant party staff, party officers or officers of federal committees.
17. No material published or circulated by or on behalf of a candidate shall defame by name or implication any other candidate and no candidate shall so defame any other candidate in the course of personal canvassing.

Counting of elections

18. All contested elections shall be conducted by secret ballot and the single transferable vote. Counts shall be conducted in accordance with the current edition of the Electoral Reform Society's publication How to Conduct an Election by the Single Transferable Vote, subject to the application of paragraph 53 below for federal committee elections.
19. The Returning Officer shall have the power to make rulings to facilitate the completion of the count.

Interpretation, complaints and appeals

20. In interpreting and applying these regulations, and in any case where the regulations are silent, the Returning Officer shall have the power to make all necessary decisions concerning the conduct of these elections, following the aims and principles of public election law.
21. The Returning Officer shall have the power to disqualify before declaration of the result, or unseat if declared elected any candidate who:

- a. has brought the party into disrepute during the campaign or where the Returning Officer has clear evidence of this happening in the near future;
or
 - b. is found to be in breach of any of these regulations,but shall not exercise such power without first offering any such candidate the right to make representation, and having regard thereto.
22. Any party member may lodge, in writing in a format prescribed by the Returning Officer, a formal complaint of infringement of election regulations upon becoming aware of any alleged infringement and not more than 7 days after the declaration. The written complaint should be addressed to the Returning Officer and specify in detail the nature of the infringement. The Returning Officer shall then decide, in full consultation with the Returning Officer team, whether there is sufficient evidence and grounds to uphold the complaint, but shall not do so without offering any candidate concerned the right to make representations, and having regard thereto. Any party member who makes repeated and vexatious complaints may be referred to the party's disciplinary system.
23. If a complaint is made prior to the declaration of the result, the Returning Officer shall have the power to postpone such declaration until the determination of such complaint or, where an appeal is made against their decision, until the determination of such appeal. The Returning Officer shall have the discretion to use this power to suspend individual candidates from serving on any position they are elected to while any such complaint is investigated and/or subject to appeal.
24. Appeals against decisions of the Returning Officer must be referred to the Federal Appeals Panel within 14 days of the decision.

Review

25. The relevant sections of these regulations will be reviewed by the Federal Board based on a report from the Returning Officer no later than six months after the completion of any election. The report must include a report on any diversity measures taken as a result of any requirement under the federal constitution, potential data protection breaches and any changes or clarifications required by rulings made by the Returning Officer or the Federal Appeals Panel.

Common provisions for leadership, presidential and vice presidential elections

26. The provisions set out in paragraphs 27–42 are common to the elections for the Leader, President and Vice President responsible for working with ethnic minority communities, except where otherwise specified.

Leadership, presidential and vice presidential elections: timetables

27. The timetable for the election shall be no shorter than 7 weeks and no longer than 13 weeks.

Leadership, presidential and vice presidential elections: nominations

28. A candidate for office of Leader of the Liberal Democrats must be a Member of the Parliamentary Party in the House of Commons, and must be nominated by not less than 10 percent of other members of the Parliamentary Party in the House of Commons, not including the candidate themselves, supported by not less than 200 party members in aggregate in not less than 20 Local Parties.
29. A candidate for the office of President must be a member of the Liberal Democrats and must be nominated by not less than 200 party members in not less than 20 Local Parties.
30. A candidate for the office of Vice President responsible for working with ethnic minority communities must be a member of the Liberal Democrats and must be nominated by any Local Party, any Regional Party, any State Party, any Affiliated Organisation, or any 10 party members.
31. Local parties include, for the purposes of paragraphs 28–30, the Affiliated Organisation or Organisations representing youth and/or students.
32. Nominations must be accompanied by the written consent of the candidate.
33. A nominator may not nominate more than one candidate for any one position.
34. After acquiring the necessary nominations for candidacy, each candidate may nominate an agent for their campaign. A candidate who fails to nominate an agent will be deemed their own agent.

Leadership, presidential and vice presidential elections: manifestos and publicity material

35. All publicity material produced in paper or electronic form for or on behalf of a candidate shall bear their agent's imprint, including a full postal address.
36. Any email messages sent out for or on behalf of a candidate for the purposes of publicising their candidacy shall also include a standard form of words provided by the Returning Officer¹ specifying how the recipient of the message may opt out of future messages.

¹The standard form of words is:

"This email was sent to [First Name] [Last Name] at [Email].

You're receiving this email because you have signed up to receive updates from [Candidate Name] about the [Election].

Don't want to get our emails anymore? Click here [INSERT LINK] to unsubscribe.

Published and promoted by [Agent Name] on behalf of [Candidate Name] at [Candidate Address]."

Leadership, presidential and vice presidential elections: conduct of election

37. The sections of the membership register containing the names, addresses and telephone numbers of members will be released in electronic version to each candidate subject to the candidate signing a data protection statement agreeing to abide by the party's data protection policies and providing evidence to the Returning Officer's satisfaction that they are able to ensure compliance with them. Any candidate or supporter of a candidate facilitating a breach of this clause will be deemed to be in breach of the party's data protection policies. Candidates should also have due regard to their own data protection responsibilities when collecting and using any data of their own in the election.
38. The Returning Officer shall coordinate arrangements for official party member hustings events with a view to balancing the competing demands for media coverage of the campaign, parliamentary and other duties and the desirability of party members to have a chance to attend or watch a hustings. Any of the official hustings may take place partly or wholly online. Other party bodies may only hold hustings-type events if they invite all candidates to attend, but they do not require the agreement of all candidates to attend or send a representative in order to proceed. Events designated as official hustings by the Returning Officer shall take precedence over any other arrangements a candidate may have made.
39. Official party communications channels may only be used to promote hustings designated as official hustings by the Returning Officer. Responsibility for organising and paying for any hustings event shall lie with the hosting organisation, but the Returning Officer will publicise in good time official hustings events via the party's website, social media channels and email communications.
40. Treating is not allowed but the reasonable provision of food and drink to campaign helpers or event attendees is permissible.

Leadership, presidential and vice presidential elections: expenses

41. For the elections for the Leader, President and Vice President of the Liberal Democrats:
 - a. The Federal Board shall set a spending limit for election expenses, not including travel or subsistence, for each candidate, when they set the timetable for the election. No candidate, or their agent, shall exceed this limit in the production of publicity material and all other expenditures connected with the campaign. This shall include any expenditure (or the relevant proportion of any expenditure) incurred before an individual becomes a candidate if the property, services or facilities are used for the purposes of the candidate's election. All donations above £500 must comply with the provisions of Schedule 7 of the Political Parties, Elections and Referendums Act 2000.

- b. Each candidate and their agent shall complete and lodge with the Returning Officer an election expenses return form. The form must have attached receipts or invoices for all expenditure and must be lodged with the Returning Officer by midday on the 35th day after the declaration of the election result. The Returning Officer will hold the expenses returns of each candidate on file and these may be examined by any party member. The expenses form shall also contain the necessary information to prove compliance with schedule 7 of the Political Parties, Elections and Referendums Act 2000.
- c. Any candidate who needs to make a report to the Electoral Commission shall do so in consultation with the Party's Compliance Department in order to ensure they meet the statutory deadlines.

Leadership, presidential and vice presidential elections: election count

- 42. The election count may be scrutinised by the candidate, their agents and one other personal representative and shall be open to any party member, subject to the capacity of the venue and at least 48 hours notification to the Returning Officer.

3. Timetable

- **Publication of the notice of elections:** Monday 29th August, 17:00
- **Opening of nominations:** Monday 12th September, 17:00
- **Close of nominations:** Monday 26th September, 18:00
- **Deadline for submission of candidates' manifestos:** Friday 30th September, 17:00
- **Despatch of ballot papers:** Tuesday 25th October c13:00
- **Deadline for return of ballot papers:** Tuesday 8th November, 14:00
- **Deadline for return of electronic ballots:** Tuesday 8th November, 17:00
- **Counting of votes and declaration of results:** Commences Wednesday 9th November, 10:00

The dates and times of the official election hustings will be provided to candidates once they have been set.

The Returning Officer's team will provide a clear schedule of deadlines and reminders to candidates agents in advance of deadlines.

Candidates are reminded that the dates provided by the Returning Officer's team are firm deadlines and that failure to meet them, for whatever reason, will be considered entirely the responsibility of candidates. Documents or information provided after the deadlines set will not be considered and attempts to ameliorate the situation will not be made by the Returning Officer's team.

4. Donations and expenses

The start date for the expenses form is the opening of nominations on 12th September 2022. The expenses limit set by the Federal Board is £15,000.

The expenses limit covers all expenditure (including gifts in kind received by your campaign) with the following exceptions:

- Travel and subsistence for the candidate and the core campaign team (however if this is received as a 'gift in kind' it may be reportable to the Electoral Commission and the Register of Interests (see section 12) Under the Electoral Commissions rules, 'Gifts in kind' of under £50 do not count towards election expenses and we propose to abide by the same rule.
- Expenses incurred before the 12th September 2022 by candidates teams do not have to be reported, but donations for those expenses may have to be either to the Electoral Commission or to the House of Commons.

Expenses incurred and used before the 12th September 2022 by candidates teams do not have to be reported, but donations for those expenses may have to be either to the Electoral Commission or to the House of Commons.

Expenses incurred before the 12th September and used by campaigns after 12th September must be reported.

POLITICAL PARTIES ELECTIONS AND REFERENDUMS ACT (PPERA)

It is a legal requirement that donations, loans and 'gifts in kind' of a value of greater than £500 must be from permissible donors (as defined by the PPERA) and this fact needs to be checked within 30 days of receipt. This also includes donations by a candidate to their own campaign.

For individuals this means that they must be on the 2020 version of the Electoral Register published in December 2019 or the monthly updates published since then. The Party's Compliance Office will be happy to carry out these checks for your campaign should you wish them to do so. Donations (and gifts in kind) of more than £1,500 in either a single transaction or an aggregate of transactions must be declared to the Electoral Commission within 30 days of being checked or for aggregates the final contribution taking it over £1,500 being checked. Again the Party's Compliance Office will be happy to prepare the necessary paperwork for your candidate to sign.

There are separate rules for other types of donors. You should consult the Compliance Office if you receive donations from bodies other than individuals.

Donors who remain under £500 in their total contribution to your campaign can remain anonymous.

We would ask you to consider the following 3 points that the party always considers when accepting donations for your campaign:

- No donation should be accepted if there is a material risk that the source of the funds could be embarrassing to the Party either ethically, or because they are associated with action contrary to the policies of the Party or because of inappropriate associations.
- Where an individual is not active or known in the Party, donations should not be accepted without full due diligence.
- Where a business is the source of a donation, at least two years audited accounts and satisfaction that they are currently trading should be obtained before the donation is accepted.

If you or your agent wishes to have a further discussion on this then please contact Kerry Buist by emailing returning.officer@libdems.org.uk.

Expenses

Each candidate and their agent shall complete and lodge with the Returning Officer an election expenses return form. A template form is [available by clicking here](#).

The form must have attached receipts or invoices for all expenditure and must be lodged with the Returning Officer by midday on the 35th day after the declaration of the election result.

The Returning Officer will hold the expenses returns of each candidate on file and these may be examined by any party member. The expenses form shall also contain the necessary information to prove compliance with schedule 7 of the Political Parties, Elections and Referendums Act 2000.

Candidates and agents who fail to do this will be referred to Standards.

5. Data Protection (part 1, basics)

This section is an introduction to data protection. You are reminded that you are always operating, as a member, under the [data protection code](#).

During the Presidential and Vice Presidential election it is essential that you understand your responsibilities when it comes to the protection of personal data and that you handle personal data in line with GDPR/Data Protection Act 2018, PECR and the Lib Dems Data Protection Rules. More guidance can be found at: www.libdems.org.uk/GDPR.

Candidates will be the data controller for any personal data they gather separately to the membership data made available to them in Connect. If you do decide to collect your own data, you do not have to register separately as a data controller with the ICO, however you will need to ensure that the following measures are in place:

Privacy Policy

You need your own privacy policy and fair processing notice for any personal data you gather. You cannot use the Federal party's policies although you can use them as a guide for writing your own policy.

Your privacy policy must include the following information:

- Your purposes for gathering personal data
- The categories of individuals who you will gather personal data from e.g. members
- The types of personal data you process e.g. names, email address, postal address.
- How the personal data is gathered e.g. via surveys, signup sheets
- The GDPR Article 6 lawful basis for processing the data you gather. (In nearly all cases this should be 6(a) Consent).
- Situations where you may share personal data e.g. with third party suppliers, where you are obligated by law.
- Whether any personal data will be shared with third countries e.g. personal data processed via Facebook is sent to their servers in the US.
- Whether your website/social media uses cookies/tracking tools.
- How long you will keep each category of data you gather.
- How individuals can exercise their legal rights over their data.

The privacy policy must be available on the candidate's website. There should be a link in the footer of the website and a link must be included within your fair processing notices.

Fair Processing Notices (FPNs)

Every time you gather personal data you must include an FPN. This is a notice given to individuals when you gather their personal data. The notice explains how their data will be used, how they can exercise their legal rights over their data and provides a link to the full privacy policy.

An FPN can be given verbally and in writing. You must also include an FPN on your social media pages.

You must make sure that you gain explicit consent to process any data you gather directly from individuals for a specific purpose. The reason and proposed use for gathering the data must be clear to the individual at the time of collection.

Content for FPNs

The fair processing notice must be formatted as follows:

Nonverbal

(Insert name of candidate) will use any personal data collected for the purpose it was provided in accordance with his/her privacy policy at: (Insert link to privacy policy). To exercise your legal data rights, email: (Insert email address).

The FPN should be situated close to where the personal data is being gathered e.g. at the bottom of the form. Sometimes it is more appropriate to put the FPN at the beginning e.g. on a Typeform survey.

Verbal

Thank you for providing this information, we will only use it for the purpose it was provided. You can unsubscribe at any time (if the data gathered is contact information). Full details of your rights and how we may use your personal data are in our privacy policy at (Insert link).

Approved Suppliers

The only third party suppliers that can be used to process personal data are those on the party approved suppliers list at: <https://www.libdems.org.uk/data-sharing>

If you want to use a supplier not on the list you will need to get the supplier to fill out the new supplier approval form at: <https://www.libdems.org.uk/dpm-supplier-approval> (Please bear in mind that this process takes approx 20 working days to complete).

Sending bulk emails

The party will support candidates by enabling the use of Mailjet is used by candidates as a marketing platform. This is not a free platform and there will be a cost associated with this.

Candidates with existing accounts on Mailchimp or other tools may use these, but will require approval from the Returning Officer & Data Protection Officer to do so.

You can sign up for Mailjet by emailing support@libdems.org.uk.

Approval may not take place until you are successfully nominated as a candidate.

Any emails you send must have an opt out function. You must honour opt outs at all times.

Sharing data

Personal data should not be shared outside of the party apart from the approved third party suppliers.

Where possible we advise that you do not download any personal data from outside of your systems. However where this is necessary you must always **Download - Use - Delete**. That is download only the data you need from the approved systems. Use the data as you need. Then when you have finished, delete it. If you are sending personal data to others you must also tell them to **download - use -delete**.

Encryption

When sending personal data electronically it is absolutely crucial that you encrypt the data first. Full details on how to encrypt personal data can be found at: www.libdems.org.uk/dpm-encryption. You must send the encryption password by a different method to the method the data was sent. E.g. if you sent the data by email you should send the password by SMS/Whatsapp/phone call.

Data Subject Rights

Individuals have rights in regards to their data under GDPR. These are:

1. The right to be informed
2. The right of access
3. The right to rectification
4. The right to erasure
5. The right to restrict processing
6. The right to data portability
7. The right to object
8. Rights in relation to automated decision making and profiling.

Your responsibilities vary depending on whether you are using Party data in connect, or data you have collected separately.

Data you have collected separately

You are responsible for handling any data subject rights requests you receive.

You must ensure that your volunteers are able to recognise when an individual is exercising one of their rights.

You must also establish a process for handling data subject rights requests and designate a contact email address where such requests can be sent and processed.

Party data in connect

In all cases, email data.protection@libdems.org.uk with the full details of the request you have received. You must provide this email within 72 hours.

Data Breaches

If you suspect that a Data breach has occurred, you must contact Esther McGee, the party's Data Protection officer (DPO) immediately by emailing data.protection@libdems.org.uk as soon as you are aware of the breach. We only have 72 hours to report a known breach to the ICO.

The Returning Officer is substantially less likely to consider a data breach a case of bringing the party into disrepute if it is reported early and the candidate (or team) take effective and earnest steps to improve the situation.

Storage and Disposal

Electronic data

This should be stored within your approved systems. Where this is not possible the stored data should be encrypted.

Data stored outside of your systems should be deleted as soon as you no longer need it.

Hardcopy data

Hardcopy data should be stored in locked drawers/cupboards within a secure, locked building.

You must delete hardcopy data as soon as you no longer need it either by shredding it using a crosscut shredder or by use of a confidential waste disposal service.

Any data protection queries should be sent to data.protection@libdems.org.uk.

6. Data protection (part 2, Party data)

Campaigns must ensure they have experience using the Party's systems in their teams. The Returning Officer does not and will not provide technical training.

Election rule 37 states (our emphasis added):

*"The sections of the membership register containing the names, addresses and telephone numbers of members will be released in electronic version to each candidate **subject to the candidate signing a data protection statement agreeing to abide by the party's data protection policies and providing evidence to the Returning Officer's satisfaction that they are able to ensure compliance with them.** Any candidate or supporter of a candidate facilitating a breach of this clause will be deemed to be in breach of the party's data protection policies. Candidates should also have due regard to their own data protection responsibilities when collecting and using any data of their own in the election."*

In order to enhance your user experience and minimise data protection risks, each campaign will be given its own access to Connect: our main database.

Candidates will be given access, and continue to have access, if and only if:

- They nominate a "Campaign Data Protection Manager". This person must be able to demonstrate to the satisfaction of the Party's Data Protection Officer that they understand their responsibilities under data protection legislation, at a minimum they must complete online data protection training.
- They sign the data protection statement

The Returning Officer's will immediately suspend access and not return it if, on the balance of probability, we believe a data breach has or may occur as a result of your or your team's actions.

We advise anyone considering being a Campaign Connect Manager to contact returning.officer@libdems.org.uk and request access to the necessary training as soon as possible.

Process for accessing member data

When a candidate passes the nomination threshold, they and their Interim Agent will then be invited to appoint a Campaign Data Protection Manager.

The Campaign Data Protection Manager will be the primary HQ point of contact for all data queries or support requests and should be an experienced Connect user.

This person will be responsible for managing data protection for your campaign, dealing with all support requests that do not require escalation.

Access to data

Not all data will be visible to campaigns. Data from other campaigns will obviously not be visible, neither will data or notes from other local parties or regions.

Export Privileges

Data Exports will be limited to Connect Managers and Deputies only. It is YOUR responsibility to see that all exports are suitably encrypted and destroyed after

use and are not shared with anyone who does not have a right to access the data. This includes contractors who are not on the party's list of approved suppliers.

Opt-in data

HQ will pre-load the membership data with opt-in info in the form of committee specific questions. If you need to change an opt-in for your committee, please record a new response to that question.

Please also ensure you exclude opted-out question responses from any lists you generate. If a member requests not to be contacted by any campaign, please fill out this form by clicking [here](#).

Please do NOT use any of the global suppressions directly and ensure that they are NOT available to callers in Virtual Phone Banks. Instead, every VPB script should include the opt out question that is specific to your committee.

If a member invokes their rights under the Data Protection Act 2018, please email data.protection@libdems.org.uk

Support requests

Campaigns will be responsible for dealing with all support requests. Campaigns may, if they cannot resolve an issue, escalate this to HQ.

HQ cannot and will not provide support or advice to a campaign practically, but can investigate system errors or data issues. We reiterate that **we strongly advise campaigns to ensure they have experience of using Party systems.**

7. Nomination

Consent to nomination

Candidates are required to signal that they consent to nomination by completing this form: <https://beta.libdems.org.uk/consent>.

Candidates are recommended to submit this as early as possible, as their name will not appear on the online nomination system until it has been received.

Candidates will be required to provide demographic information as they fill in this form (see section 7.1 below).

Required member nominations

A candidate requires the nomination of not less than 200 members in not less than 20 Local Parties.

The party has created an online nomination form (this can be found here: <https://betalibdems.org.uk/request>) to ensure candidates are able to collect nominations easily.

We are not making paper nomination forms available in this election cycle to reduce the chances that candidates are unable to make the ballot and to reduce the administrative burden on staff running the election.

It is strongly advised that candidates should collect more than 200 signatures to allow for errors or invalid nominations that may come to light when the papers are checked.

We will be able to give you an accurate up to date current total of how many signatures have been checked and will do so on request, at most once per day. Candidates will also receive an email notification when an online nomination is submitted for them. This does not mean the nomination has been accepted and it may later be invalidated by the Returning Officer.

Please remember the deadline for completed forms is Monday 26th September, 18:00. Completed forms received after the deadline, for whatever reason, will not be accepted.

Withdrawal from the process

Candidate attention is drawn to the deadline for withdrawal of candidature (17:00 21st October 2022).

Candidates will be unable to remove themselves from consideration beyond this date, with no exceptions for whatever reason. Candidates who express a desire to withdraw after this date will still feature on all despatched ballot papers.

Should a candidate that wishes to withdraw after this date win the election, they can inform the Returning Officer. A candidate withdrawing in this way will remain on the ballot and take part in the count in the normal way. If elected, they will be deemed to have resigned and the count immediately re-run with them having been removed and their first preference votes redistributed accordingly.. Should no eligible candidates remain to be elected after withdrawals have been dealt with, a new election will be called.

7.1 Required questions

Rule 16 of the election regulations states:

"16. In addition to candidates' manifestos, the Returning Officer may decide to require each candidate to provide answers to common questions about their suitability for the position(s) for which they are standing. The Returning Officer shall draw up these questions in consultation with relevant party staff, party officers or officers of federal committees."

There will therefore be a requirement for candidates to complete additional questions set by the RO. Candidates will be asked these questions as part of their manifesto submission form.

Answers will be limited to 750 characters (including spaces). Answers provided by candidates will be made available to members and displayed alongside the election addresses.

It is the candidate's responsibility to ensure that their answers to the questions are accurate and not in any way misleading.

7.2 Appointing an agent

Candidates should appoint an Agent when they receive confirmation that they have been duly nominated. The agent must be a member of the Liberal Democrats.

If a candidate does not appoint an agent, they will be deemed to be their own agent.

They should do this by emailing returning.officer@libdems.org.uk and detailing the agent's name, contact details, and membership number.

As with a public election, the agent can be changed at a later date.

All correspondence from the Returning Officer's to any Candidate will also be sent to that Candidate's agent.

8. Election Address (manifesto)

In this election the vast majority of members will vote electronically and the election address will be displayed electronically. Each candidate's election address will consist of a maximum of two A4 pages. Do not run artwork features across both pages.

Election addresses should be provided with all fonts and images embedded in the PDF and in a RGB colour profile. The PDF provided should be suitable for use on the internet.

The final deadline for artwork is Friday 30th September, 17:00, 2022. Exceptions to this deadline will not be made.

Candidates are advised to submit their artwork well before the deadline, so that in the event of it not conforming to the specification or the election rules, it can be modified and re-submitted. Artwork must be submitted via this online form:

<https://beta.libdems.org.uk/submit-manifesto>

It is the responsibility of the Election Agent to ensure that the correct version is submitted to the Returning Officer. The RO team will publish the first version received.

Material validating any candidate endorsements contained within the artwork (either by text or photograph) should be submitted at the same time and must arrive before the deadline. Any queries as to what constitutes an endorsement should be directed to Kerry Buist: returning.officer@libdems.org.uk.

Throughout the process, the most recently submitted artwork will be treated as superseding all previous submissions.

Candidates must also submit a plain-text version of their manifesto for candidates with access needs. Candidates can also submit a photo to be displayed on the electronic ballot paper as well as a 280 character statement of why they should be elected, which will also appear on the electronic ballot paper.

If, at the final deadline, the latest artwork submitted does not conform to the specification or rules, it will be treated as follows:

- if the artwork is oversized it will be reduced, in proportion, until it is A4;
- if the artwork is undersized it will be printed as supplied, centred in the page;
- if any material within the artwork does not conform to the rules it will be replaced with white space.

9. Photographs, Videos and Endorsement guidance

Photographs and Videos

You must get consent to take and publish photos of anyone under the age of 18 using a photo consent form. A consent form for this purpose is available, on request, from returning.officer@libdems.org.uk. An adult consent form template can be found in appendix 1.

You do not need to gain consent for crowd shots.

When organising events you should add the following disclaimer on the event page/poster “photos will be taken at this event and may be used for Liberal Democrats’ publications, you can exercise your legal data rights by emailing: data.protection@libdems.org.uk”

On all publicity material, where you are using a group shot where a person’s face is identifiable, you do not have consent from but you must include the following statement.

“Appearance in this photo/video does not constitute an endorsement.”

For all photographs and videos, you should also read through our endorsement guidance before making a final decision on its usage.

Endorsements

If any of your campaign material includes the image of / or statements from any key or high-profile individuals (including but not limited to, current or former elected officials or party office holders) you must ensure that they give signed written consent to your use of such an image or statement.

Additionally, for all statements of endorsement you must provide signed consent from the individual regardless of their status.

You must supply proof of consent to the endorsement by email to the Returning Officer before publishing the publicity material. A template for this proof can be found in appendix 1.

10. Hustings and candidate events

Candidates are expected to participate in all hustings arranged by the Returning Officer, no matter the format they may take. If a candidate is unable to participate, they may send a substitute.

The Returning Officer's team will ensure that hustings are arranged well in advance.

The order in which candidates make opening and closing remarks during each hustings will be determined in advance. The determination will be random. Candidates, or their agent/representative, may join a Zoom call to **watch the Returning Officer's team make that decision (at random) on Wednesday September 28th at 18:30:**

Join Zoom Meeting

<https://libdems.zoom.us/j/85781636818?pwd=UTVhcXZ4UjN5aFFkKzFXZHFUcEZ2QT09>

Meeting ID: 857 8163 6818

Passcode: 959443

Advice for candidates relating to preparing for online hustings can be [accessed by clicking here](#).

10.1 Other Party events

The Returning Officer may also ask candidates to attend one party fundraising event during the course of the campaign.

Candidates and their teams are advised that they should pass any requests for additional hustings outside of the HQ organised ones to the Returning Officer.

No event may be considered an official hustings unless the Returning Officer deems it so. Candidates are at liberty to attend unofficial hustings events if they so choose but are not required to do so.

Candidates can organise their own events and publicity, at their own cost. Party officers cannot use their official positions and party data to promote a particular candidate.

Candidates may not attend events at which they are campaigning unless all candidates have been invited. This rule allows for candidates to continue with their other Party obligations, for instance serving on their local Party executive.

If a candidate attends an event, to which not all candidates were invited, at which they campaign, the cost of that event will be considered part of that candidate's election expenses. Candidates are strongly encouraged to notify the Returning Officer's team of any invitations they receive.

11. Balloting

The election will primarily be an online election with members able to cast their vote online using their Unique Voter Code.

Hard copy ballots issued through the post will only be dispatched to those members who specifically request one. Postal ballots can be requested via [this typeform](#) or by emailing elections@libdems.org.uk.

Members will be instructed to return hard copy ballots to our independent election service, MiVoice, and will be provided with a Freepost return envelope to allow them to do so. We will endeavour to ensure that any ballots sent, erroneously, to Lib Dem HQ instead are successfully delivered to MiVoice for processing.

However, we do not guarantee that votes received to HQ will be counted nor do we accept any responsibility for the non-inclusion of votes received in this way. Proper mobilisation of any one candidate's vote is the responsibility of that candidate.

Queries about replacement of damaged ballot papers or failure to receive ballot papers will only be dealt with if made by the individual member affected and not by any third party (exceptions will be considered for medical reasons or for power of attorney).

Such requests should be made in writing by letter or email, or by calling HQ. HQ may require people to prove their identity before issuing a replacement ballot paper, especially if it is to a different address or email address to the one the party has on file. We will not entertain any requests for replacement ballot papers from candidates or candidate teams.

Requests for postal replacements will close at 5pm 20th October 2022 and for electronic replacements will close on 1pm 25th October 2022.

Please note that our normal practice is to regard ballot papers that have been received and deliberately thrown away to be a choice to not vote in the election.

11.1 Count

This will be a mixed ballot; the manual ballot papers will need to be entered as they are returned to prevent duplicate voting and to collate the vote together.

Where people have voted twice the first vote received will be counted and any subsequent vote will be disqualified. A record of where this happens will be kept for inspection by the Returning Officer.

A separate file of disputed ballots will be kept and how they are resolved for inspection by the agents of the candidates.

An opportunity will be provided for candidates' agents or a representative nominated by the agent to meet Mi-Voice and have an explanation of the voting system at an early stage in the process. The Returning Officer will attend this meeting.

An opportunity to test a random sample of input ballots to verify the scanning process will be provided on the morning of the declaration and to deal with any spoilt ballot decisions.

Information about how the count will be run, including the use of diversity quotas, will be provided to candidates after the close of nominations.

11.2 Declaration

Full details are still to be confirmed.

We expect to hold the declaration event at Liberal Democrat HQ (1 Vincent Square, London SW1P 2PN). The results will be declared in this order: President, Vice President, Committees (in the order they appear in the Constitution), ALDE delegation.

As we do not know the number of candidates or the complexity of the count, we cannot at this time provide an estimate of the time each count will take, though we expect the event to take the entire working day.

12. Contacting the election team

All contacts with the Election team should be made in writing, by emailing returning.officer@libdems.org.uk.

This inbox will have an auto response setup to confirm receipt.

Candidates with difficulty using email should, in the first instance, ask that their agent lead on communications. The Returning Officer's team may, on request, agree to discuss matters on a recorded Zoom call with candidates.

Candidates should provide HQ with a list of up to two people allowed to act on their behalf, in addition to themselves, their agent and their data officer. **The Returning Officer will only communicate with candidate campaigns via the candidate themselves, their agent, or the two nominated additional people.** We strongly advise you to ensure that your designated contacts are available throughout the

election process and, between them, have a broad understanding of the challenges of an election.

All queries will be acknowledged automatically and manually in writing within 2 working days and a timetable for a response given. If a ruling is required, this may take 3-5 working days.

It is important that this chain of communication is followed by the candidates and their teams as it protects the clear chain of decision making and appeal to a higher level set out in the election rules.

The Returning Officer's team reserves the right not to reply to emails which are extremely lengthy, lacking in clear requests or content, or which form part of a larger stream of vexatious communication. Candidates are reminded that if they wish to make a complaint, they should do so using the information in section 13. The Returning Officer's team will not engage with hearsay or quasi-complaints made another way. Assertions made without evidence can and will be rejected without evidence.

The Returning Officer is the David Crowther

The Acting Returning Officer is the Chief Executive, Mike Dixon.

The Deputy Acting Returning Officers are Kerry Buist, Greg Foster and Jack Coulson. Deputy Acting Returning Officers may be changed during the course of the election to account for staffing needs.

13. Making a complaint, raising an issue of concern and self-referral

Complaints

If you believe another candidate has broken the election rules or have a concern relating to their conduct, you may make a complaint or raise a concern with the Returning Officer's team.

This must be done [via this typeform](#). The Returning Officer's team will not accept complaints made by other means.

Your complaint must:

- Specify about whom you are complaining;
- Specify which rule(s) you believe have been broken or which sections of guidance have not been followed; and
- Provide evidence.

The Returning Officer's team is not responsible for investigating matters raised. You are responsible for providing evidence of accusations made.

If you make a complaint, you are expected to not publicly comment on the complaint until and unless given permission to do so by the Returning Officer's team.

The Returning Officer withholds the right to summarily dismiss a complaint or issue if it is lacking in evidence, does not relate to a specific rule or section of guidance, or does not relate to a specific candidate. Assertions made without evidence can and will be rejected without evidence.

The Returning Officer's team will, if it determines it wishes to consider a complaint, inform the accused and request a response from them which will be considered.

The Returning Officer's team will require candidates and their teams to comply fully, promptly, and openly with any of its requests.

The Returning Officer's team may interpret repeated complaints which are unsubstantiated by evidence or which do not relate to the election rules as vexatious. Vexatious complainants may be considered to be bringing the Party into disrepute.

Self-referral

If you believe you have broken the election rules or failed to follow the guidance, please [self-refer using the same typeform](#).

Self-referral will usually mean that a candidate is not punished. If you are concerned that you may have done something outside of the rules, please refer yourself to the Returning Officer at the first opportunity.

Appendix 1 - Consent forms

Photograph / Video Consent Form

I hereby give consent for *insert candidate's name* campaign to take and/or use relevant historic pictures or videos of me on their campaign material without compensation to me. I agree that such images can be used with or without the incorporation of my name.

FULL NAME (Please print Clearly) DATE

SIGNATURE

Endorsement Consent Form

I hereby give consent for the following statement to be used as an endorsement for *insert candidate's name* campaign. The statement reads:

“ *insert statement here* ”

FULL FULL NAME (Please print Clearly) DATE

SIGNATURE