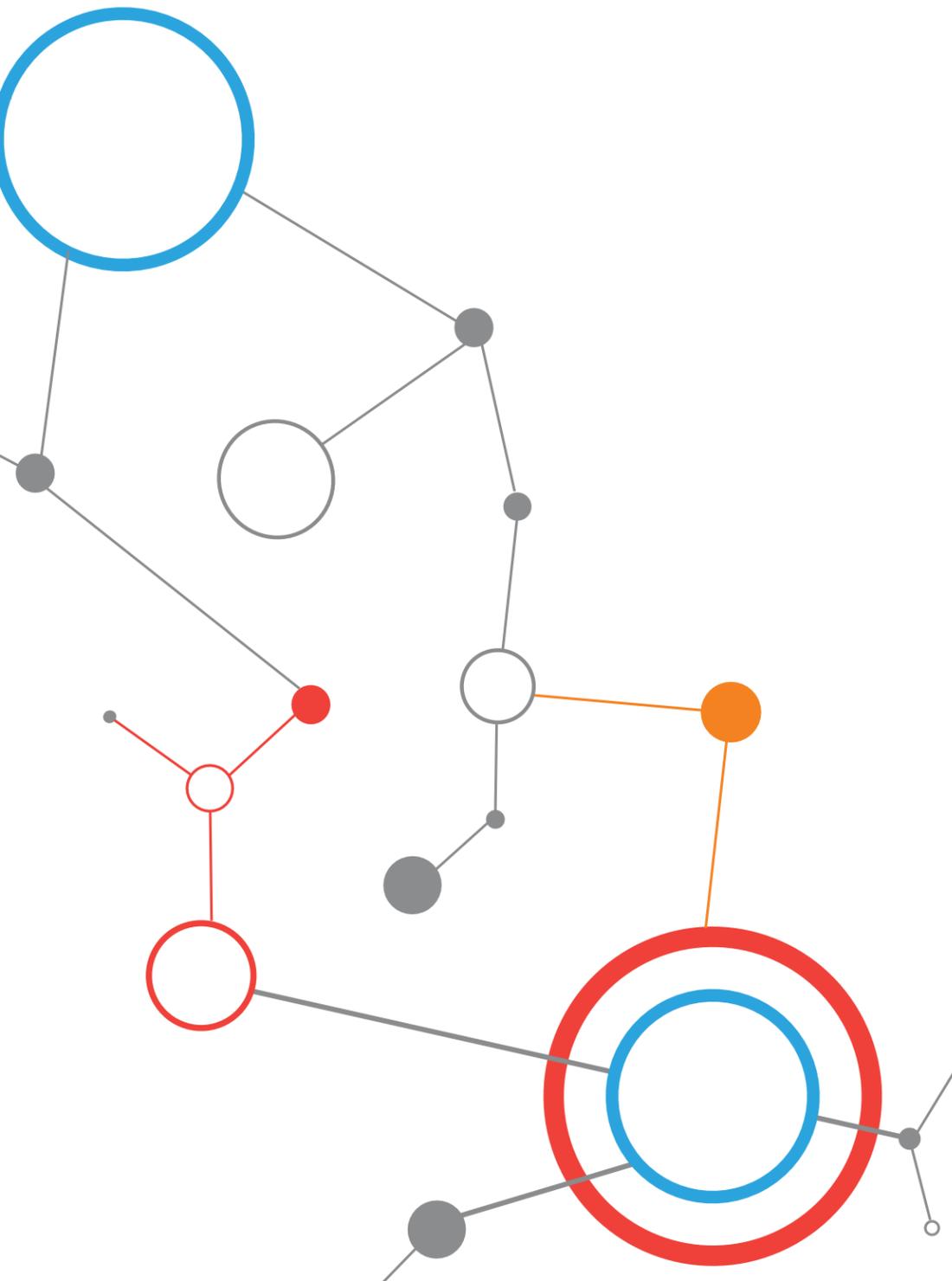


# Electoral District Associations

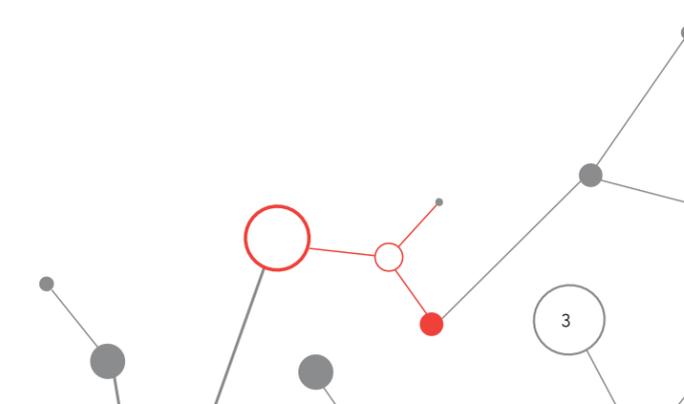
Handbook





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# Welcome

The Proxy Party will be front and centre as we will be contenders for seats in the House of Commons with a message of widening democratic participation and modernizing our political institutions.

Taking on any role within an EDA is a very exciting opportunity as you will be growing the Proxy Party of Canada locally. It is no secret that in addition to championing public issues and giving our fellow citizens hope for the future on the public realm, success for the party is also predicated on establishing viable riding associations (Electoral District Associations, a.k.a. EDAs).

Politics, you will learn, is a very simple process that is an exceptionally powerful tool for social change. It is strongest when controlled locally. By starting an EDA you are helping to ensure that the Proxy Party of Canada's message can be delivered locally with a supported candidate who can take the Proxy Party's message and policies, and address local concerns. The role of an EDA is a simple one – to ensure the candidate has as many resources (money and members) available for their campaign in an election. The EDA is the logistical vehicle behind any well executed election campaign. A primary purpose for an EDA is to be fundraising as much money as possible between elections so the candidate has the nomination deposit ready and enough money to order some election materials from the moment they are registered and on the ballot. Additionally, an EDA is responsible for growing the local community to bring

as many people from all walks of life into the Proxy Party, who will in turn not just donate money, but help the candidate during the campaign to identify supporters and get out the vote on Election Day.

An EDA is in place to ensure the Proxy Party Candidate does not start well behind other candidates in the riding. You are taking on the responsibility to ensure our candidates are well supported during their campaigns.

## GETTING STARTED & REGISTERED WITH THE PROXY PARTY OF CANADA

By being officially registered your EDA can:

- accept contributions
- issue official income tax receipts
- provide goods or services or transfer funds to a candidate endorsed by a registered party
- provide goods or services, or transfer funds to a registered party or a registered association, or
- accept a candidate's surplus electoral funds, a leadership contestant's surplus leadership campaign funds, or a nomination contestant's surplus nomination campaign funds.

When starting out as an EDA, planning is everything. You will need to balance out your efforts to fundraise as well as recruit members, volunteers and candidates. Money and human resources are equally important

to a successful campaign as they are to a successful EDA. It is a tricky balance to maintain; therefore this guide will focus on EDA roles that can be easily transferred to a candidate's campaign team. Chances are you are in a riding that is just starting to organize, where membership is low, so you may be required not only to run an EDA but the candidate's campaign as well. Your goal is to build up the local riding to the point where you have the option to choose which team you want to be on – the EDA or the candidate's campaign. Both will be more successful if individuals can focus all their energy and time on one activity. No matter how complimentary they appear to be the activities of an EDA and a campaign team are different.

An EDA's focus is to ensure a candidate's campaign team has enough resources to function more effectively in each successive election. They are also there to find a candidate that the local members feel can best represent the riding in the House of Commons by localizing the Proxy Party of Canada's message.

A candidate's campaign team is there to ensure the candidate is constantly engaging the public and that they are identifying supporters and getting the supporters out to vote on election day.

These two goals are connected and one feeds the growth of the other until the riding can be won.



# Inaugural Meeting

Once you have read through this guide and discussed setting up an EDA with other interested people you will need to set up your inaugural meeting. The inaugural meeting is where your group will adopt a constitution and elect the first executive. This process is a lot more straightforward than it sounds.

You will start the process by contacting your Proxy Party organizer. Your organizer will help you organize the meeting since the organizer or an appointed representative of the Proxy Party will attend your inaugural meeting to ensure the Proxy Party Constitution and guidelines are adhered to, and to be a resource to facilitate the meeting by answering any questions that may arise with your fledgling association and the party in general. First and foremost, the interested members will need to book a date with your regional organizer so they can help answer any questions and possibly attend the meeting (or send a representative). Additionally, the date must be far enough away to ensure that notice of the meeting reaches all members within the borders of the electoral district 30 days or more before the meeting is to take place. The 30 day notice is a requirement (?) but it also allows any other interested member in good standing the chance to come forward for the executive elections. If you send the invitation to all listed lapsed members, expired members and contacts in the riding you will find a lot

more people will join the party to run for these executive roles. There is also a need to recruit and invite people off the contact list. They must be members for a minimum of 14 days (?) before the new member can be eligible to vote. Lapsed members can renew at any time and instantly get their voting rights restored.

There must be a minimum of 2 executives elected at the inaugural meeting (and 2 executives plus an auditor at all times between AGMs). A CEO and Financial Agent are required for you to become registered. These roles cannot be occupied by the same individual. Other executive positions should have duties and responsibilities attached to them that are easily transferable to a campaign team. We suggest roles of Communications Chair, Organizing Chair, Fundraising Chair, and Membership Chair in addition to the CEO and Financial Agent as the next growth step. Once these positions are filled you can add people like Secretary, Treasurer, Administration Chair, Youth Chair, Volunteer Organizing Chair. Having titles such as Member-at-Large do not have specific duties attached which means your members will have a hard time assessing what this person should be measured against when the next AGM and executive election comes about. It also means they haven't been specifically trained for any campaign role.

Adopting an EDA constitution is also an easy process. There is a template constitution provided by the Proxy Party organizer. The template EDA constitution is divided into two sections:

- Section one is the Proxy Party Constitution and cannot be changed.
- Section two is focused on best practices. EDA founders can contribute to this set of best practices, provided the additions are voted on by the EDA members and do not contradict the Constitution. EDA constitutional amendments can only be done through members at an AGM or a membership wide vote. A copy of the approved constitution needs to be filed with the GPNS organizer and a copy of any updated constitution should changes occur.

Before the inaugural meeting begins, a meeting minutes taker must be appointed. The minutes of the inaugural meeting are required as part of the registration process with the Proxy Party as proof of the elected executives and the adoption of the EDA constitution. The minutes should be delivered to your Proxy Party organizer by an agreed upon date which can be set between the newly elected executive and the organizer at the meeting.

It is a strongly recommended to map out the year ahead. The annual plan will be a constant work in progress but it also allows all your members to make an informed

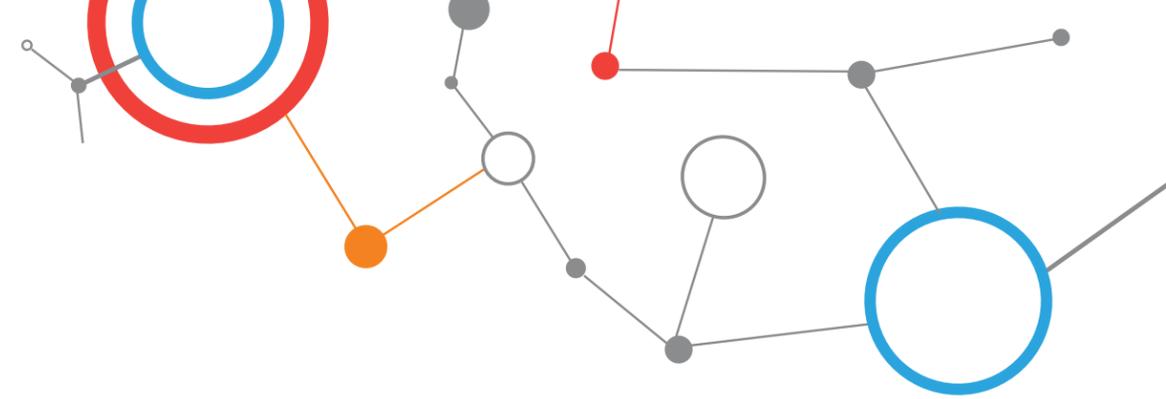
decision for the next AGM when the current executive present their report to show which goals have been met and which have not. Having an annual plan for the EDA allows you to give your members a quantifiable report on your activities and performance feedback. Use the AGM as a time to schedule the first EDA Executive meeting, an ideal place to begin work on the annual plan. This planning work is best done in the first week to capitalize on the enthusiasm and energy of members.

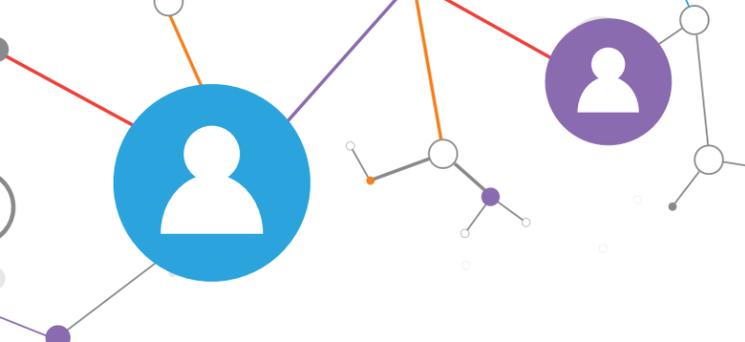
Once the inaugural meeting is completed, the executives have been elected, the EDA constitution adopted and the minutes have been recorded the EDA executive can begin the official registration process.

## PROXY PARTY OF CANADA EDA NAMING CONVENTIONS

All new EDAs are required to register their name in the following format <Name of Riding>< Federal Proxy Party Association>. For example, the Proxy Party name for the Calgary Centre riding will be named: *Calgary Centre Federal Proxy Party Association*.

If your EDA has already been registered in a different manner, or the riding name has changed, please take note that in the future you will be required to update your registered name to comply with this naming format.





## BANK ACCOUNT

A bank account needs to be opened by the Treasurer of an EDA for contributions and expenses of the EDA. No person other than an agent of the association shall accept contributions, make transfers or pay expenses from this account. The Financial Agent will have to issue receipts for all of the contributions accepted, and is legally responsible to deposit them into the EDA's bank account since bank statements must work with the Proxy Party Official Agent and or Treasurer to ensure Elections Canada reporting requirements are adhered to.

## ANNUAL GENERAL MEETING (AGM)

Every single year, your EDA must hold an AGM that functions similarly to the inaugural meeting used to officially start up the EDA. Once the meeting date has been confirmed the EDA executive must ensure that all members within the borders of the electoral district are given notice of the meeting at least 30 days or more before the meeting takes place. The term of all EDA executives representing the Proxy Party is one year (or from one AGM until the next should the time be more than 12 months). The AGM is where new executives of the EDA are elected; a required annual process.

AGMs are opportune times for any updates to the EDA constitution, since the entire membership is included in the voting process. An EDA's constitution can only be updated by a membership wide vote and the AGM provides the opportunity for this to be done at least once a year.

The AGM is also the time for the local membership to receive the annual report from the outgoing executives and help determine the next annual plan with the newly elected executive. At each AGM, the outgoing executive will present their annual plan and measure their results and present this to the membership. This will help everyone to know what worked and what didn't, where to focus more efforts and areas that require development. The presentation of the annual report will show whether or not the EDA followed the budget, met the fundraising goals, election readiness goals, and membership goals set by the executive. The newly elected executives can use this information as well as feedback from members to work on their new annual plan that will detail these same goals for the New Year.

## SAMPLE AGM AGENDA

### 7:00 PM Call to Order

- Welcome
- Appoint Chair
- Appoint Secretary
- Record Attendance
- Approve the Agenda

### 7:10 PM Annual Report from outgoing CEO and Financial Agent

- CEO to overview accomplishments and status quo of EDA.
- FA to give Financial Report.

### 7:30 PM Explanations of Executive Positions

- Nominations
- Voting Procedures explained

### 7:45 PM Voting and Counting of Ballots

- Ballots Cast
- Ballots Counted
- Results Announced

### 8 PM Review of Constitution

- Approve and if necessary, amend the constitution for the EDA.

### 8:15 PM Discussion of Annual Plan, Budget and Goals

- Discuss and provide feedback to the EDA Executive to help them form the annual plan, budget and goals for upcoming year.
- Feedback will be sought to help set fundraising, election readiness, and membership development goals.

### 9 PM Meeting Adjourned

- Announcement of the next meeting of the EDA Executive.

## AGM REPORT

After the AGM concludes, the newly elected executive must provide your Proxy Party organizer with a copy of the minutes of the AGM and an updated constitution.



# Roles and Responsibilities

The required roles for each Proxy Party EDA are the CEO, Financial Agent and Auditor.

Each of these roles can only be occupied by a paid up member in good standing of the Proxy Party except the Auditor, who is essentially an employee of the EDA for all intents and purposes should their services be required to audit the annual financial return. The Auditor does not need to be a member because they are paid for their services.

Once a CEO and Financial Agent are in place we suggest adding roles like Communications Chair, Organizing Chair, Fundraising Chair, and Membership Chair as the next growth step. These are the people you will need to get involved in your future and more elaborate election campaigns. When one person can take responsibility for one area of the association they are learning skills that will relieve stress from the central campaign roles.

Once these positions are filled you can add people like Secretary, Treasurer, Administration Chair, Youth Chair, Volunteer Organizing Chair.

## CEO

The CEO of an EDA is the person responsible for the direction of the EDA and is the person who speaks on behalf of all members of the EDA. This is the person who is in place to ensure each and every member has an equal voice in the direction of the EDA. The CEO is there to ensure that meetings, nomination contests, and votes all take place fairly and that the local membership is aware of these events and procedures. The CEO is also the individual responsible for ensuring that all deadlines for filing reports, financial returns and updates are met.

During an election period the role of the CEO of an EDA is easily transferred to the Campaign Manager role. Although the candidate has the ultimate decision on who is on the campaign team, CEO should have the skills to fit into this role easily. Since CEO are focusing on developing the local association by increasing membership and ensuring that the message and money teams are on track according to the annual plan, a CEO can do the same thing for an

*“You can do what I cannot do. I can do what you cannot do. Together we can do great things.” MOTHER TERESA*

election campaign. If not selected as part of the campaign team, the CEO should step aside graciously and allow the campaign team to speak for themselves.

Since CEO's are the main point of contact with members they have the skills to conduct the campaign's task of identifying supporters and getting them out to vote on Election Day. The CEO has the poll maps of the riding as well as the poll-by-poll results from the last campaign.

For a small, first-time campaign, the task is to focus on a limited number of the top polls in your riding, usually the top five or ten, and try to identify every single person who voted for the Proxy Party candidate in the last election. A systematic campaign plan is implemented to maximize the

potential voters to vote for the Proxy Party on voting day. Such a plan follows these steps:

- Organize a volunteer-based door-to-door campaign;
- Provide volunteers with an easy way to mark who the person is and who they support;
- If nobody is home, pass the collected information on to the phone volunteers who will follow up the door-to-door campaign;
- Phone volunteers follow up with phone calls to record the same information initially sought in the door-to-door campaign;
- Once the ridings are covered, on Election Day call everyone who indicated they would vote for the candidate or were undecided but warm to the idea;
- On the call, provide a warm and friendly Election Day reminder and provide helpful details such as voting hours, polling stations, etc.
- When required and if possible, offer prospective voters a ride to the polling station if they are unable to travel there themselves.

Once the first time campaign strategy has been implemented, this becomes the foundational supporters that the local party can draw on to take part in the next election. These are also strong candidates to invite to EDA functions and eventually, in upcoming elections, will be the group most sympathetic to funding requests. A note of caution; always give people the same level of respect and dignity you would like to be treated with. This means never taking advantage of them by only asking them for donations or constantly badgering them to volunteer. If we do our job right and educate on the issues which

the Proxy Party can resolve, those who resonate strongly with the party platform will support it on their own accord.

Once you have reach the stage of identifying a definite pool of support in your riding, you can focus on expanding this base. For example, if you start with five of the top polls identified, the next time you should have enough contacts to focus on ten, then twenty, etc...until you reach the point where you can cover the entire riding. There is no avoiding this work in the trenches because it is the absolute foundation layer of all politics. Without putting in this hard work, a candidate's campaign can never be successful.

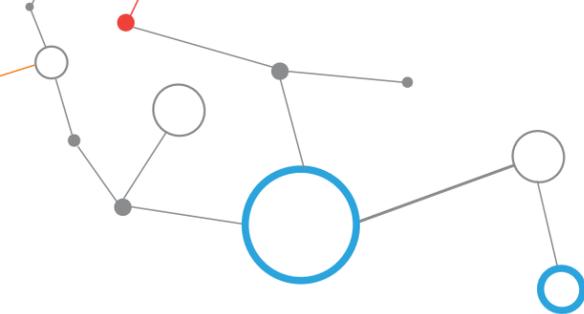
## FINANCIAL AGENT

The registered association must appoint an eligible person as its financial agent.

## INELIGIBLE PERSONS

The following persons are not eligible to be a financial agent or an electoral district agent:

- an election officer or a member of the staff of a returning officer
- a candidate
- an appointed auditor
- a person who is not an elector or citizen of Canada
- an undischarged bankrupt, and
- a person who does not have the capacity to enter into contracts in the province or territory in which the person ordinarily resides



## RESPONSIBILITIES OF THE FINANCIAL AGENT

The financial agent of a registered association is responsible for administering its financial transactions and for reporting on them, in accordance with the Act and in conjunction with the Official Agent of the Proxy Party of Canada.

During an election period the Financial Agent has all the skills appropriate to being the Official Agent of the candidate. However the candidate has the final decision in this matter and is not required to use the Financial Agent of an EDA as the official agent for the campaign.

## ISSUING RECEIPTS

Only monetary contributions made to the EDA are eligible for receipts valid for income tax purposes. If someone makes a non-monetary contribution of goods and services they must be given a receipt but it cannot be valid for income tax purposes, it is merely an acknowledgement of the value of the goods and services provided.

The biggest question to arise with receipting contributions is when a member joins the party at the EDA level. If the new member joins by only giving the ten dollar membership contribution (????), simply forward the entire amount with the new members contact details to the national office of the Proxy Party of Canada and the national office will provide the new member with a receipt. If a new member joins by giving a larger contribution, for example \$50.00 or more then the EDA will have to deposit the full amount into the EDA bank account and provide the new member with an acknowledgement receipt for the entire amount. It does not need to be an income tax receipt since this member

may contribute more before the year is done. Then the EDA will transfer \$10.00 to the national office with details for the new member. Since a new member is not considered a member until the national office receives their details and the \$10.00 membership contribution, it is vital that this information gets passed on as quickly as possible. Especially if you are running a nomination contest and new members are joining to be eligible to vote, they are not eligible until they are registered with the national office.

For all non-monetary contributions over \$25 and for a monetary contribution over \$25 for which no official tax receipt was issued, the financial agent must issue a receipt not valid for income tax purposes. The *Income Tax Act* prohibits an association from issuing official tax receipts for non-monetary contributions so your receipt is basically a record of the value and an acknowledgement of the non-monetary contribution.

## AUDITOR

The registered association may appoint an eligible person, or partnership of persons, as its auditor. The auditor verifies the association's financial transactions return in accordance with the Act. On their appointment, the registered association must obtain the auditor's signed consent to act in this capacity.

An association can have only one auditor at a time. If the auditor dies, becomes incapacitated, resigns, or if the association revokes the auditor's

appointment, it must appoint another without delay. The chief executive officer of the association must certify the report outlining the change.

## ELIGIBILITY OF AUDITOR

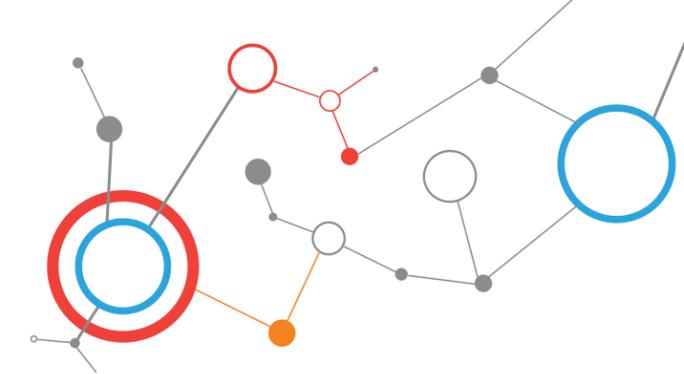
Only the following are eligible to be an auditor for a registered association:

- a person who is a member in good standing of a corporation, an association or an institute of professional accountants (C.A., C.G.A. or C.M.A.), or
- a partnership of which every partner is a member in good standing of a corporation, an association or an institute of professional accountants

## INELIGIBLE PERSONS

The following persons are ineligible to be an auditor:

- an election officer or members of the staff of the returning officer
- a candidate and the official agent of a candidate
- a chief agent or registered agent of a registered party or an eligible party
- electoral district agents of registered associations
- leadership contestants and their leadership campaign agents
- nomination contestants and their financial agents, and
- financial agents of registered third parties



## RESPONSIBILITIES OF THE AUDITOR

The auditor must provide an audit opinion as to whether the *Registered Association Financial Transactions Return* is a fair and accurate presentation of the information contained in the financial records on which it is based.

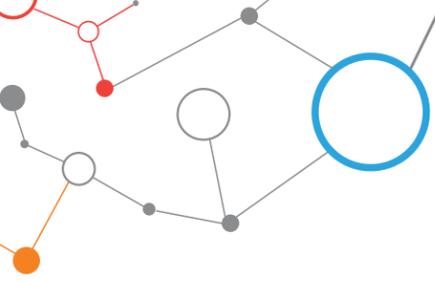
## RIGHT OF ACCESS

The auditor must have access, at any reasonable time, to all of the association's documents. They may require the financial agent and electoral district agents of the association to provide any information or explanation that is necessary to enable the auditor to prepare the audit report.

## POLICY CHAIRS

The Policy Chairs have the responsibility of coordinating policy initiatives of the EDA. This includes creating meeting space for local members to express their opinions and priorities vis-à-vis policy. It also includes drafting policy resolutions for consideration by the federal party and establishing a relationship with the Proxy Party of Canada Policy Chairs.

During and after the pre-writ period it is important for Policy Chairs to communicate with the EDA's nominated candidate to advise this person as to issues which are of relevance to local communities existent in the EDA.



## SECRETARY

The EDA's Secretary records minutes of the monthly EDA meetings. Duties also include dispersing these minutes to fellow executive members in a timely fashion (usually within a week of the meeting). The minutes usually contain a very condensed account of important topics discussed and an exact stating of the motions brought before the EDA executive and the recording of the votes pertaining to those motions.

## SUGGESTED ROLES

### FUNDRAISING CHAIR

A primary reason for registering an association is to provide a vehicle for fundraising between elections, which gives candidates a head start whenever an election is called. It is impossible to win an election without a penny in the campaign coffers. A candidate's campaign is legally limited to election times. That means the candidate can only accept contributions and give out tax receipts from the time they are registered with the Returning Officer and the polling day for the election. An EDA isn't limited to this time frame. So when an election is called the funds that the EDA has raised for the candidate get transferred to the campaign account.

The Fundraising Chair is the person who directs the fundraising activities of the EDA and is there to ensure the fundraising goals set out in the annual plan are met. This person should be able to encourage others to pledge to raise a certain amount. The best

fundraisers never ask for a cent, they simply inspire others involved in the cause to go out and fundraise for the EDA and the candidate. For instance, if you want to raise \$10,000.00 for the EDA that is extremely imposing for one person but if that person motivates 10 people to pledge to raise \$1000.00 each, the goal becomes reasonable to achieve. There is a high probability that the fundraising chair will be filled by someone on the candidate's campaign team, but when this is not the case, the successful applicant should be prepared to work alongside the candidate's fundraiser.

If your EDA raises no money, this handicaps your riding's candidate before they start an election campaign. Fundraising needs to commence early and continue throughout the year. In the first year of an EDA's existence the minimal goal for fundraising should be the \$1000.00 nomination deposit required for a candidate to register.

The Fundraising Chair position requires a person with experience raising money, and this implies an assertive personality, confidence and a level of comfort soliciting donations. These skills are especially important in a riding with low membership. The fundraising chair needs to be able to effectively communicate and train people on the fundraising initiatives. There is a direct correlation between success and funds available to a campaign. Having funds allows the campaign to pay essential workers who can then afford to dedicate more time when they are paid for their efforts. More funds also ensure the campaign can afford to advertise itself and get its message out to the voting public.

### MEMBERSHIP CHAIR

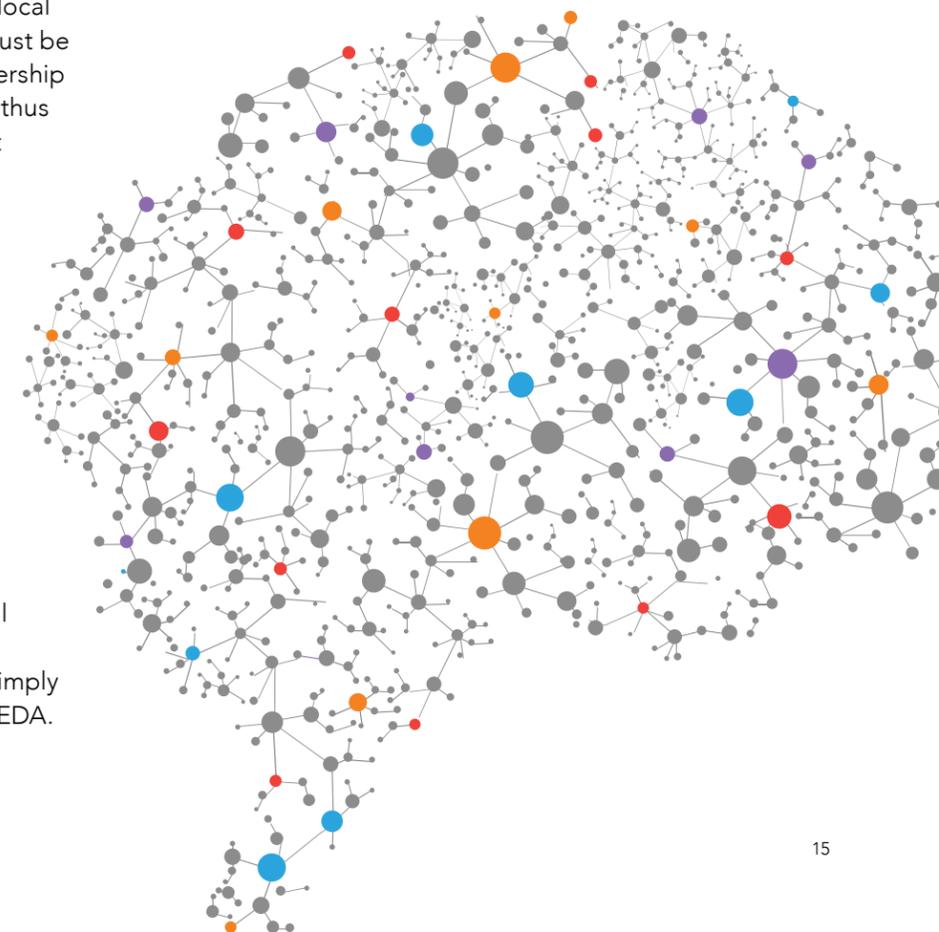
The role of the Membership Chair is mainly to act as the point of contact between the EDA, the local members, and the Proxy Party of Canada. This person will also be responsible for maintaining the party's database when it goes live. Once fully operational, the database will remove the following steps as membership information and numbers will be shared directly between the Proxy Party's national office and local EDAs.

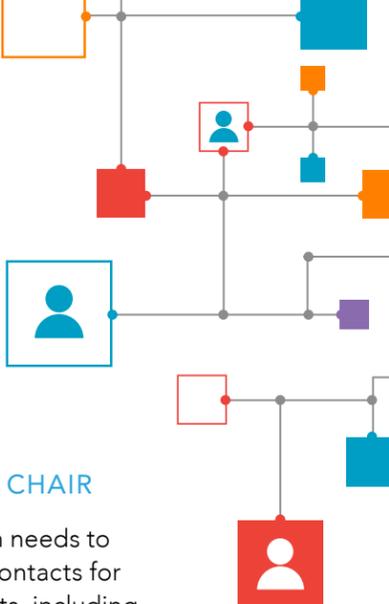
Before an EDA hosts an AGM the Membership Chair needs to make a formal request with the Proxy Party of Canada's national office for the local membership list. The request must be made in writing, and the Membership Chair needs to sign the request thus indicating their legal agreement to use the Membership List only for Proxy Party business within the riding.

It is also essential that the Membership Chair have access to a working e-mail account as this is the method of delivery for the membership list.

The Membership Chair is responsible for meeting the membership development goals set out in the EDA's annual plan. The responsibilities of the Membership Chair go beyond simply attracting new members to the EDA.

During an election the Membership Chair can join the campaign team in a very similar role of signing up new members and maintaining records of the new members as well as recording more granular roles such as: basic member, a regular contributor, a member that volunteers, or a contributing non-member. The Membership Chair is the person in charge of recording information and ensuring the other teams like the ground campaign and fundraising campaign have access to the membership list, the contributors list and the voters list.





**COMMUNICATIONS CHAIR**

The first task this person needs to undertake is to gather contacts for all the local media outlets, including those who cover community activities and those who covers politics. When an election is looming, the job of the Communications Chair is to find out which desk will be covering the election and who to forward media releases to. Contact the national party to see if a media database is available for your area.

The Communications Chair needs to develop the local message that is consistent with the national message and push it out to the local media and voting public. This will mostly be media releases about EDA planned events and media releases that address local issues. This person needs to be able to write copy on a timely basis and in a professional manner as well as distribute it effectively. The Communications Chair needs to have Proxy Party responses ready for any local issue, so contact with the national media team is essential as well as keeping up to date on the Proxy Party policy, platform, national media releases and campaign updates. This person should be prepared to work closely with the candidate's campaign team and share contacts with the candidate's media team if it is separate. The local EDA is able to issue press releases in the name of the local EDA (i.e. Calgary Centre Federal Proxy Party Association) but not for the national Proxy Party of Canada.

new volunteers, even if there seems to be nothing for them to do. Campaign management has shown that volunteers who aren't given tasks when they first come forward are unlikely to be available later when they are needed.

Outside of elections, the Organizing Chair can also engage in planning for the next AGM, finding keynote speakers, organizing training sessions and finding volunteers to help during the AGM. The Organizing Chair should be able to staff any event planned by the EDA with volunteers who have identified themselves. You will only get larger pools of people willing to volunteer if you can identify your supporters during an election but be mindful that most voters are only willing to give some money when an election is looming or happening so try to ensure you know who has indicated a willingness to volunteer before you start contacting every supporter for help.

During an election campaign, the Organizing Chair is the person with one of the best skills to organize the ground campaign and is likely to assume this role. The ground campaign consists of organizing door-to-door and telephone canvassing, delivering signs and generally making sure the right people are in the right places at the right time. The Organizing chair should be identifying people in between elections to serve as poll captains, and sign captains; so that once an election is called a full team is ready to go.

**ORGANIZING CHAIR**

The Organizing Chair needs to work closely with the other EDA teams to address their human resource needs for campaigns and events. The person in this role helps with membership drives and must work closely with the Membership Chair in order to recruit more people involved in the EDA's activities. This role is also ideal for identifying supporters and leading a get-out-and-vote campaign during an election. Once the membership chair has brought in volunteers from amongst the members, the organizing chair then begins the work of identifying the tasks best suited to the new volunteers, matching where human resources are lacking. Door-to-door canvassing is generally not a desirable job amongst volunteers. Unfortunately, it is an absolutely vital for a successful campaign. Hence the Organizing Chair needs to have the ability to help volunteers see the important value of this position and recruit them for these roles.

The primary skill of the Organization Chair is the ability to place the right people in the right positions. To perform this job effectively, the Organizing Chair must be aware of all of the volunteer positions that need to be filled in order to engage any

For a first time campaign, the membership chair will use the membership list to attract campaign volunteers for canvassing (door-to-door and telephone) as well as volunteers for other activities such as sign delivery or bringing voters to the polls on election day. The membership chair should also work with the fundraising chair to ensure all members are contacted about contributing to the candidate's campaign financially. For the next election the membership chair should use all the information that the door-to-door and telephone canvass gathered to increase membership. Once all the supporters from the top few polls are identified, they can be targeted directly for membership and to volunteer to cover the next top polls until the election, at which time the local EDA group should have sufficient volunteers to cover the entire riding.



# Best Practices

## ADOPT A CONSTITUTION & BYLAWS

At your inaugural meeting present a constitution to be voted on by your members, you should use the template constitution found in this handbook. The EDA can make additions, such as additional executives or committees, as long as they do not conflict with the template constitution as presented or with the Proxy Party Constitution. An EDA's constitution cannot contradict or violate the national Proxy Party Constitution and must be approved by all local members of the EDA.

The bylaws of the EDA are there to ensure that things like the creation, operation and reporting structure of committees is streamlined and straightforward. An EDA can set up various councils or committees to support and work with the executives. It is best to have the rules set out before you begin the process than making them up as you go, as differences may emerge that can be divisive to the EDA's membership.

## ANNUAL GENERAL MEETING (AGM)

An EDA must hold an AGM once per calendar year and not more than fifteen months following the previous AGM. The process for an AGM has been covered previously.

## PROCEDURES FOR MEETINGS

Always set a date and location that accommodates the number of people anticipated. If you are just starting out and are trying to attract new members from the voting public you should consider holding the monthly meetings in a public venue such as a local pub, coffee house or community center if you don't have another available space. It is best if the location has a space you can book for free when funds are tight.

Smaller meetings, such as executive or committee meetings can take place at a member's home for a much more relaxed atmosphere. Meetings should generally be held during weeknights with both start and end times clearly stated on invitations, reminders and advertisements. If you are giving e-mail notices to members, consider posting the agenda or general objectives.

Before the meeting takes place, set an agenda and hand out copies to people who show up even if you e-mailed them the agenda previously because items may have been revised. Have refreshments and if possible paper and pens for attendees. Make sure you are early to prepare the meeting space and have a sign-in book to gather people's contact details. After the meeting, the Membership Chair will transfer any new contacts or members recorded in the sign-in book to the party's database.

Start on time and follow the agenda. Assign someone as chair and someone to take minutes. Having a good chair will keep the meeting flowing. For larger more public meetings, the chair must put aside their opinions so that everyone is comfortable voicing an opinion and feel that the meeting is run objectively. The chair should not hesitate to set limits on speaking times and enforce them to ensure the meeting does not run overtime, or is dominated by a few individuals, especially if you are renting space. If an executive is seeking the nomination for candidacy they must take a leave of absence from their executive role until a candidate has been selected to ensure the process is free and democratic.

Someone must be elected or appointed as the minute taker for every single meeting the EDA executives conduct. Keeping minutes is one of the most important activity to take place at your meetings as it is the record of all decisions and must be available to the local membership to ensure the EDA is operating openly and in accordance to the EDA constitution and the Proxy Party Constitution.

When concluding the meeting you should set a tentative date and time for the next meeting, and give notice of when the minutes will be available (at the latest for the next meeting). Give dates for agenda items to be submitted to the executive and how to remain in contact with the EDA – generally via e-mail. Thank everyone for attending and make sure you have everyone's contact details from the sign-in book.

## ANNUAL PLAN: SET REALISTIC GOALS

The goals the EDA sets will likely require hard work to achieve, but they should not be impossible to achieve. The reason the EDA exists is not to simply find a local candidate, but to ensure that once found, your candidate has enough financial as well as other forms of support to run an effective campaign during an election. Although your ultimate goal is to get a Proxy Party MP elected in your riding, you must approach this as a long-term goal. By conducting activities constantly and consistently during non-election times, it will make election campaigns that much easier to conduct.

Determine areas of strength and focus your efforts there. Always attach a dollar amount to fundraising goals so your fundraisers have a target to work towards. If it your first foray into fundraising, don't be too disappointed if you don't achieve the goal you set. The feedback is invaluable for helping you attain a clear picture of what further resources are required in future fundraising campaigns. Don't be discouraged because it takes time to become sufficiently familiar with your riding to be able to accurately predict what is possible. Your first few years will be the time to become acquainted with your area of support.

You will have to balance your efforts between fundraising and building a support base in your riding. While money is important, it alone cannot guarantee victory or achieve a targeted percentage of votes if the candidate is not active. An active campaign's success, however, can be limited due to

*"To vastly improve your country and truly make it great again, start by choosing a better leader. Do not let the media or the establishment make you pick from the people they choose, but instead choose from these they do not pick."*

SUZY KASSEM

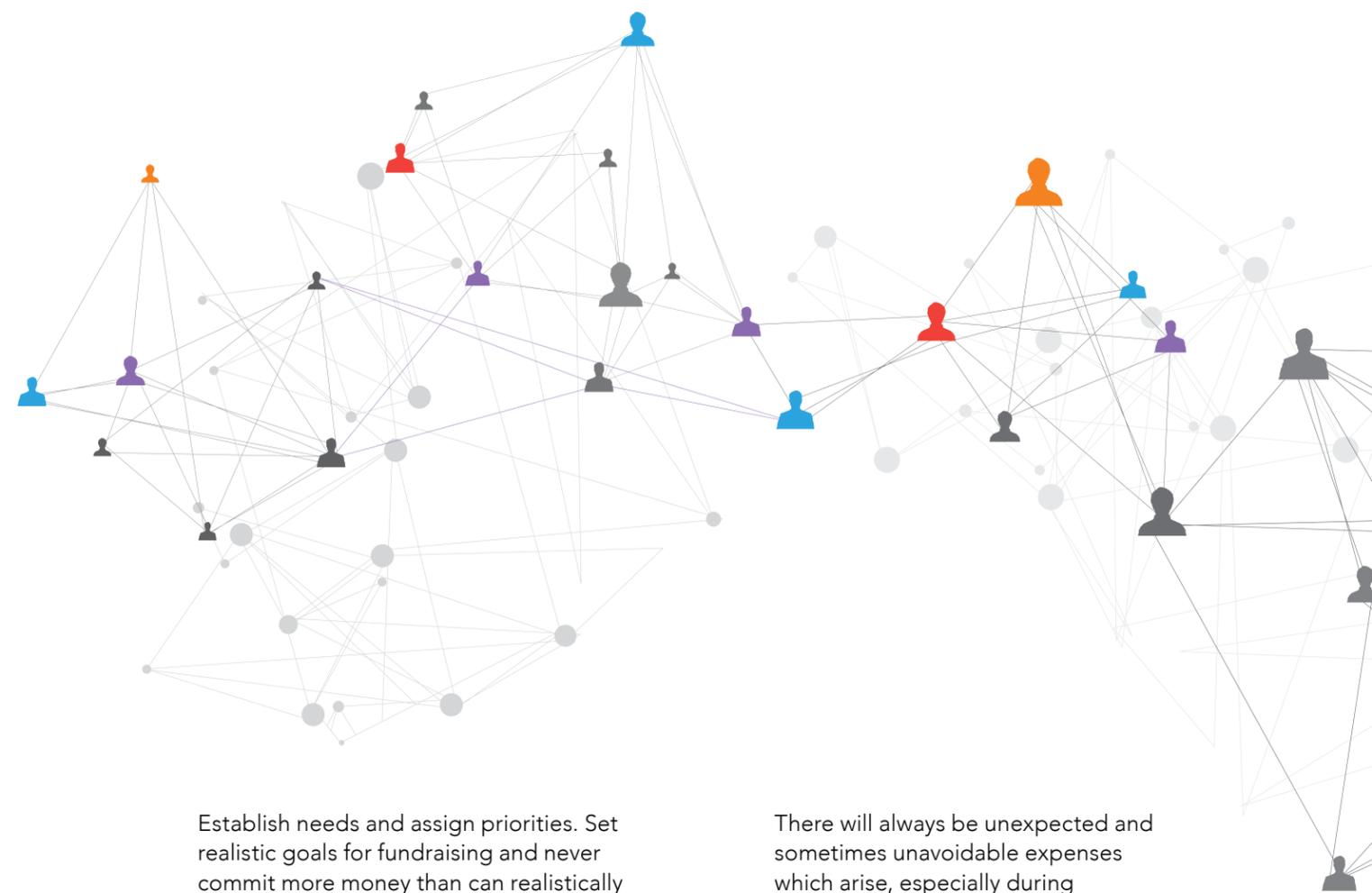
lack of funds. If you are a new EDA your minimum goals should be to find a local candidate who can run an active campaign along with raising enough funds to pay for the nomination deposit and keeping local membership up-to-date. There is a sweet spot of membership contact frequency. It is important to send messages often enough to remind members to renew their membership and avoid expiration. However, if it's too frequent, or if members perceive that your only reason for contacting them is to simply ask for more money, they will feel used and quickly stop participating. It is your job to create community with them. Work on building a strong sense of community and a strong sense of purpose. Once members

understand and resonate passionately with the vision, then people will not need coercion to make financial pledges. They will simply do it because it is aligned to their own fundamental worldview.

With each consecutive campaign your EDA should attempt to grow the local support as well as the funding received to help support the EDA's activities and the candidate's campaign. Based on past campaigns, some experienced EDA members feel that trying to double what you've accomplished in the last election, either in fundraising or votes received, is a sound strategy. Once you start the process of identifying supporters in your best polls you will be able to draw from an ever increasing pool of known and identified supporters to cover expanding territories. Having more people who are identified as being Proxy Party supporters means you have more potential volunteers and contributors to increase the size of your campaign in the next election.

#### BUD T

Developing and adhering to a budget is extremely important for an EDA's annual plan. You must get value for every dollar spent and, during an election, ensure that electoral spending limits are not exceeded. It is absolutely vital for the Financial Agent and other agents of the association to ensure that all money raised is properly received, and that all non-monetary contributions are properly accounted for.



Establish needs and assign priorities. Set realistic goals for fundraising and never commit more money than can realistically be raised. At the same time, the more money you fundraise, the more you can afford to advertise and conduct a variety of activities. Once the budget is set, stick to it. Have a contingency plan to handle both 1) raising less money than expected and 2) raising more money than expected. Know what programs can be sacrificed with a limited budget and what programs are worth spending on should you exceed your fundraising targets.

Meetings with your candidate and members will help establish priorities for spending. For instance, EDAs with more volunteers will spend less on delivery costs when distributing flyers and placing signs, but EDAs with more funds than volunteers should spend the money to mail out materials that would otherwise be hand delivered by volunteers. The Financial Agent is in place to ensure that funds are neither spent nor committed if they are not available. The Financial Agent is legally responsible for the finances of the EDA, and should therefore be involved in all financial decisions.

There will always be unexpected and sometimes unavoidable expenses which arise, especially during an election campaign. Build in a contingency by budgeting at least 10% less than the electoral riding expense limits if you are at that level of support for your candidate. The penalties for candidate's spending more than the legal limit are severe.

It may be tough to let go after all your hard work between elections but if a candidate has a separate campaign team your EDA needs to transfer as much money as possible, if not all to them. The whole purpose of an EDA is to ensure you have selected a trustworthy candidate who elicits a high degree of confidence, and which the EDA wishes to see elected to parliament. The fundraising effort between elections is done to ensure the availability of funds to run a fantastic campaign. Once a candidate is chosen, they should be working with the EDA executive on budget items and the campaign plan but ultimately your role is to support the candidate in every possible capacity that you are capable of offering.

# Activities

Now that your EDA is up and running, your priorities should be to establish a community of local support. The first task is to ensure membership numbers are maintained and that you can continue to engage your supporters in discussions and activities. The trick to strong membership engagement is to simply let people be themselves. Do not treat your supporters as pack mules or bags of money. Give your volunteers and supports the freedom and space to organize on their own and to encourage and inspire one another to do better locally. Avoid any tendency to persistently complain as it sets a bad example and attracts others of a similar mindset. Such tendencies rarely lead to productive outcomes.

The key to growing your EDA and achieving the goals you set is to be as active as you possibly can within your community. Your supporters do not have to instantly turn into fully-fledged members. You'll find that everyone involved in your EDA will receive donations from people simply because they know and trust one another. Trusting and accepting your supporters level of commitment, regardless of their level of commitment, makes everyone feel welcome and not pressured to be something they are not. Allow for every different interpretation and form of support and encourage the diversity. When people are ready to commit more, they will naturally take the next step. Trust in everyone's internal path.

Being active within your community means many different things to many different people. As an EDA, you should view all community activities and community groups as places for supporters to interact with voters. This doesn't mean you show up to every citizen's association, or club meeting with the intent to convert everyone to the Proxy Party. Instead, use it as an opportunity to talk to other involved people in the community and show them the Proxy Party is involved as well. Showing that Proxy Party members are active in their community is the best promotional tool your EDA has.

## FUNdRAISE

Effective fundraising is vital to political activity. Whether it is paying nomination deposits for candidates, printing leaflets, or hiring staff, money will not only make things easier, but make things possible. Although electoral law has changed in regards to fundraising you can keep things rather simple. For starters, ensure that whoever decides to take on fundraising activities is well aware of the limits to contributions (contact your Proxy Party organizer). Beyond that, most funding will fall into two categories; 1) core funding for EDA activities and 2) election financing. Elections are the most expensive activity for all levels of a provincial party, and they are much more regulated at all levels by Canada's *Election Act*. If you get the election financing wrong, the EDA can end up with legal complications.

## NOMINATION CONTESTS

Nomination contests are your best opportunity to dramatically increasing the amount of members in your EDA. Having two or more candidates vying for the same position means they will be out signing up as many new members as possible to support their bid for the candidacy. Make this process as simple as possible for them by clearly informing the contestants when the 14 day cutoff date is for new members to be eligible to vote and never ever delay sending off new member information to the head office of the Proxy Party. A member is only considered a member from the time their details and \$10.00 membership fee is received by the national party, not just your EDA (.

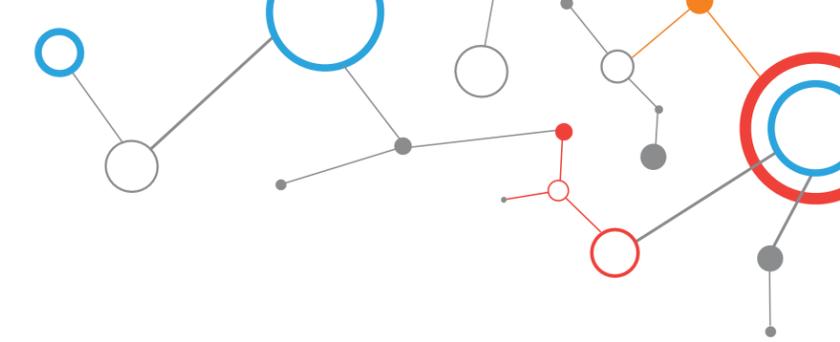
Leaders are successful, not simply because of accomplishments and message but because their team was capable of bringing in a number of new members who were guaranteed to support their bid for leadership.

When your EDA is hosting a Nomination Contest, it is important for your EDA to conduct a fair, open and democratic process. This means if an executive of the EDA is seeking the nomination they must step down from their executive position until the conclusion of the nomination process.

Nomination Contests are not required to have a time limit, however the Proxy Party requires that notice of the nomination contest reach all members within the EDA 30 days before the selection date.

If there are any EDA Executive meetings during a Nomination Contest, all registered nomination contestants must be invited to attend the meetings. When the candidate is selected, they will continue to attend the EDA Executive meetings in order to plan for the election campaign with the EDA executives and local members.





## EDA Involvement

The benefit of an EDA is that it provides a functioning campaign team between elections that can fundraise and build local support continuously, while candidates are limited to accepting contributions only during election times. Having funds available for your candidate to draw upon is extremely important, especially having the \$1000.00 refundable nomination deposit ready for the election. The amount of funds, volunteers, supporters and members you can attract during non-election times will have a major impact on the EDA's success in the election.

### IDENTIFY POLLS

Help identify polls (areas within the riding) that gave the Proxy Party the most support during the last election (non-applicable as of June 2016) so the candidate can canvass there or target the areas for flyers as well as planning and attending local events.

### ELECTIONS CANADA DEADLINES

Gather all the important dates needed for the election and give all these to the candidate. Include the deadline to be officially registered, polling day, day to return the official receipts, day to provide their Official Agent with their personal expense form, and the date the Official Agent must file the campaign return. You can donate a wall calendar with the dates highlighted.

### ANNOUNCE THE CANDIDATE

Schedule a meeting to introduce your candidate, both your members and to the public and send a press release to

the local media. Set a time and a place, but be realistic about how many people will show up. Don't book a convention hall for 300 people when you only have 20 members, or it will give the impression of an unsupported candidate. Advertise the event through your website, Facebook site, word-of-mouth through social networks and post notices on community bulletin boards.

Make sure you have a meeting agenda. Have the candidate and helpers show up about half an hour early to help prepare the room and ensure there are enough Proxy Party materials available such as platforms, flyers, banners, signs or merchandise such as hats, t-shirts, bumper stickers and pins. Start the meeting on time. People will inevitably show up late, delaying too long will create an atmosphere of annoyance for those who arrived on time and leave a negative impression of poor organization. Have an EDA member or executive introduce the agenda for the meeting. Then create a bit of fanfare before introducing the candidate. The candidate should next give a ten to twenty minute speech. Talk to the candidate before the meeting to go over the speech and boost confidence. Provide reassurance but help the candidate to focus on addressing the audience with the main issues, delivered in a compelling and inspiring way.

The audience will want to know a few things such as: who the candidate is (emphasize local involvement); why the candidate supports the Proxy Party; why the candidate is running in this election; what are the main issues; what solutions

does the candidate propose; how does the local campaign reflect the larger goals of the Proxy Party; and what are those Proxy Party goals. Take some questions from the audience for the allotted Q+A period then break for refreshments and informal discussions with the press in attendance as well as members. In closing, announce the time and place of the next EDA meeting and provide people with contact details to reach you if they would like to get involved. Also announce the campaign HQ if there is one. When the event is over, clean up the venue, secure the venue and leave on time.

### FIND OUT WHO HOSTED ALL-CANDIDATE MEETINGS DURING THE LAST ELECTION

Begin to establish contact with these groups and try to find out who will be organizing the one for this election. Secure dates, times and places for the events as well as an invitation for your candidate. Always be polite when dealing with these associations. The Proxy Party member will likely not always be invited, but they cannot stop you from attending if the meeting is open to the public.

### MEDIA CONTACTS

Build relationships with newspapers, radio and television stations/programs so that as soon as your candidate is announced, you can arrange for media coverage immediately. The more coverage the campaign receives in the media, the more you will start to influence the direction of the election in your riding. If there is no media coverage of the Proxy Party candidate, then no Proxy Party issues will be considered important election issues.

### SET UP CANDIDATE & MEDIA TRAINING SESSIONS

This can be done in conjunction with other local EDAs and it is a good way to introduce candidates to each other. The more candidates your candidate is introduced to, the greater the feeling of a team effort. If there are no other EDAs around you, make sure you invite the surrounding candidates to attend your training session. You can also hold the training sessions for everyone interested in becoming a candidate or for all the nomination contestants. This will give them a bit more confidence and they will be more likely to put their name up for election. Contact your Proxy Party Organizer for more information and to arrange a free training session (depending on schedules you may not have the opportunity for a free training session so remain in touch with your Proxy Party Organizer if this is something of interest to you).

### FORM AN ELECTION READINESS COMMITTEE

If you have a well organized candidate who has put together his or her own campaign team and has everything under control, your executive is there to help accomplish the candidates objectives and to convey any electoral goals that were brought forth by the local membership at your AGM. However, if your EDA has recruited a first time candidate well in advance of the election call or if you do not have any candidates ready, you should start planning for the election as a team. The EDA executive can jump into the required campaign roles or support



a candidate's campaign team. Remember, you are there to help the candidate and the candidate's team. If the candidate does not have a team, then you should volunteer to help in the appropriate role. If a candidate has organized a campaign team, you offer to help and volunteer to work under the campaign manager. The campaign manager is in charge of the electoral campaign and you are there to help the candidate achieve the stated electoral goals. In many cases the EDA executive will need to double as a local campaign team or pinch hit for incomplete campaign teams.

### FINDING VOLUNTEERS, WORKERS AND MEMBERS

Following is a list of sources for volunteers, workers and members who can build your team:

- Identified supporters, datamined from the last campaign – they can help to secure financial support for the campaign or volunteer for the campaign.
- Constituency members, datamined from your database – they may volunteer for the campaign or take signs.
- Those who have worked on other campaigns such as workers and donors.
- People who have replied to mailings, contacted the EDA or attended meetings.
- Friends and relatives of executive, candidate, and members.
- Local NGOs – contact people within local NGOs and ask them to prepare a list of potential workers for your campaign. The person you're talking to can even help out.

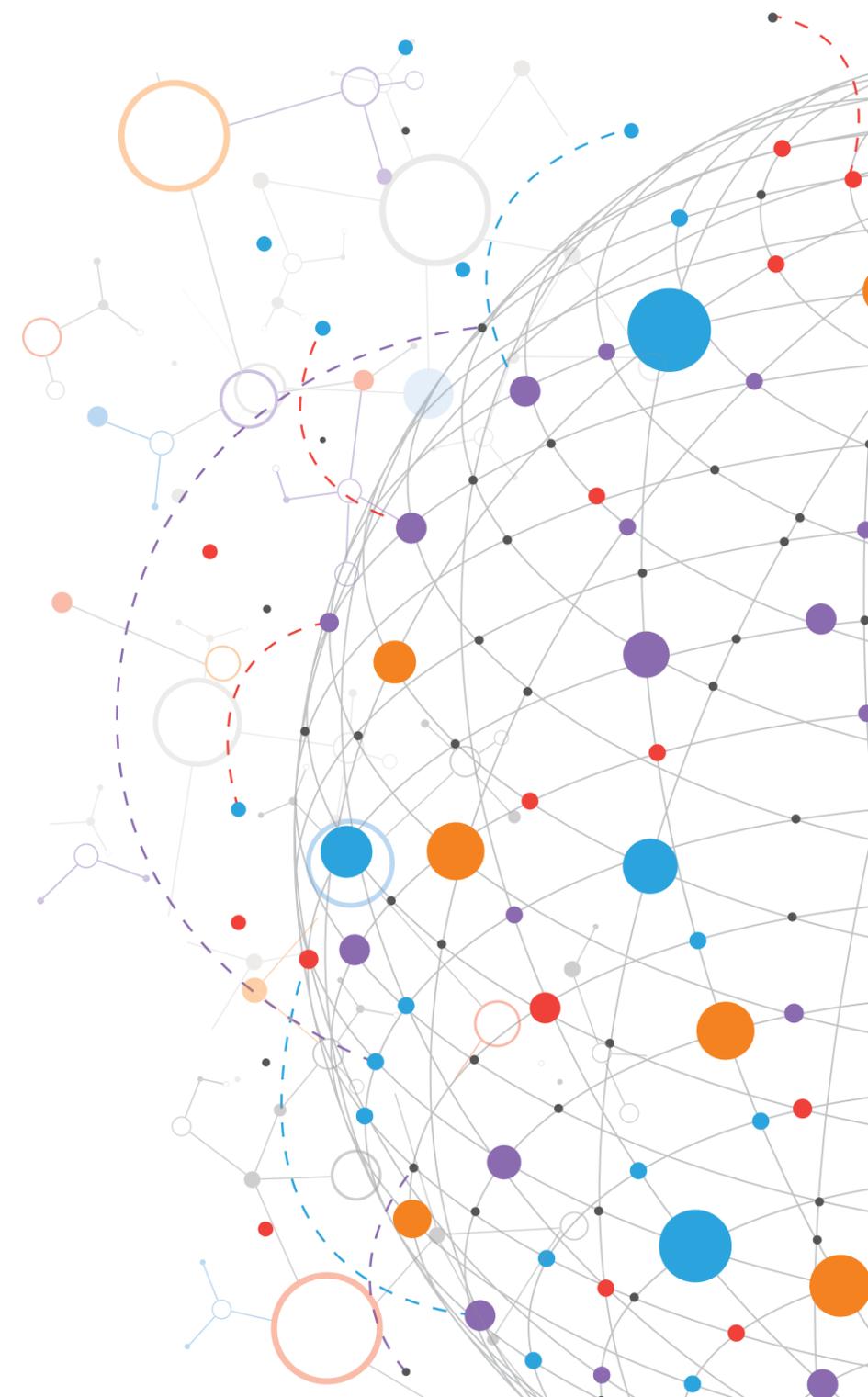
- Groups the candidate and members had prior involvement with – any form of citizen group.
- New supports you meet while canvassing during the current campaign – it's never too late to get a new volunteer or donation.
- Attendees of the nomination meeting and contest
- High school, college and university students.

Keep the candidate in the public's eye and have simple ways to contact the EDA such as a website, email and phone number. Also keep a sign-in book during EDA events open to the public. The Membership Chair's responsibility is to enter all gathered contact information into the supporter database.

### IDENTIFY LOCAL PRINTERS

Try to identify local printers who can cost-effectively produce quality Proxy Party election materials for your candidate on time. Get quotations on a number of typical campaign print items such as posters, business cards, etc at different order quantities. No printer will hesitate to offer you an estimate so ask for different order types using different materials. For instance ask how much it would cost to print 100, 200, 500, 1000 or 5000 lawn signs. Use whatever numbers you think are likely to be ordered and do the same for brochures and business cards. Always ask for a delivery time as well because you don't want to get your signs delivered after Election Day.

Work with your Proxy Party organizer and other EDAs to order generic items in bulk from reliable print shops. You will be able to save money this way by sharing cost at a reduced per item cost.





# EDA handbook