



# School Elections Manager

## Returning Officer User Guide

### About the School Elections Manager

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The School Elections Manager is a digital platform that makes it a breeze for schools to setup and manage their BOT elections all in one online space.

Created to help de-stress and simplify the school's election process, the School Elections Manager encourages the whole community to get involved and stay informed.

**In real-time:**

- **Returning Officers** can set up an election website, approve nomination candidates, and publish election results.
- **Candidates** can create and submit their nominations and view their progress.
- **Everyone** can stay informed about key dates for nominations and voting and view the election results as soon as they are published.

### Contents:

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As a Returning Officer (RO), you have the responsibility of creating and managing your school's BOT election using the School Elections Manager.

**This user guide will help you carry out the following steps:**

1. Accessing your election dashboard
2. Understanding your election dashboard
3. Managing the nomination stage
4. Adding/editing/approving a candidate
5. Managing the voting stage
6. Publishing your election results
7. Dealing with enquiries

**You should be familiar with the contents and processes outlined within the NZSTA returning officers handbook.**

For any or all enquires please contact:

Email: [returningofficer@cessl.org.nz](mailto:returningofficer@cessl.org.nz) Phone: 03 338 4444 Wayne Jamieson / Eric Yu.

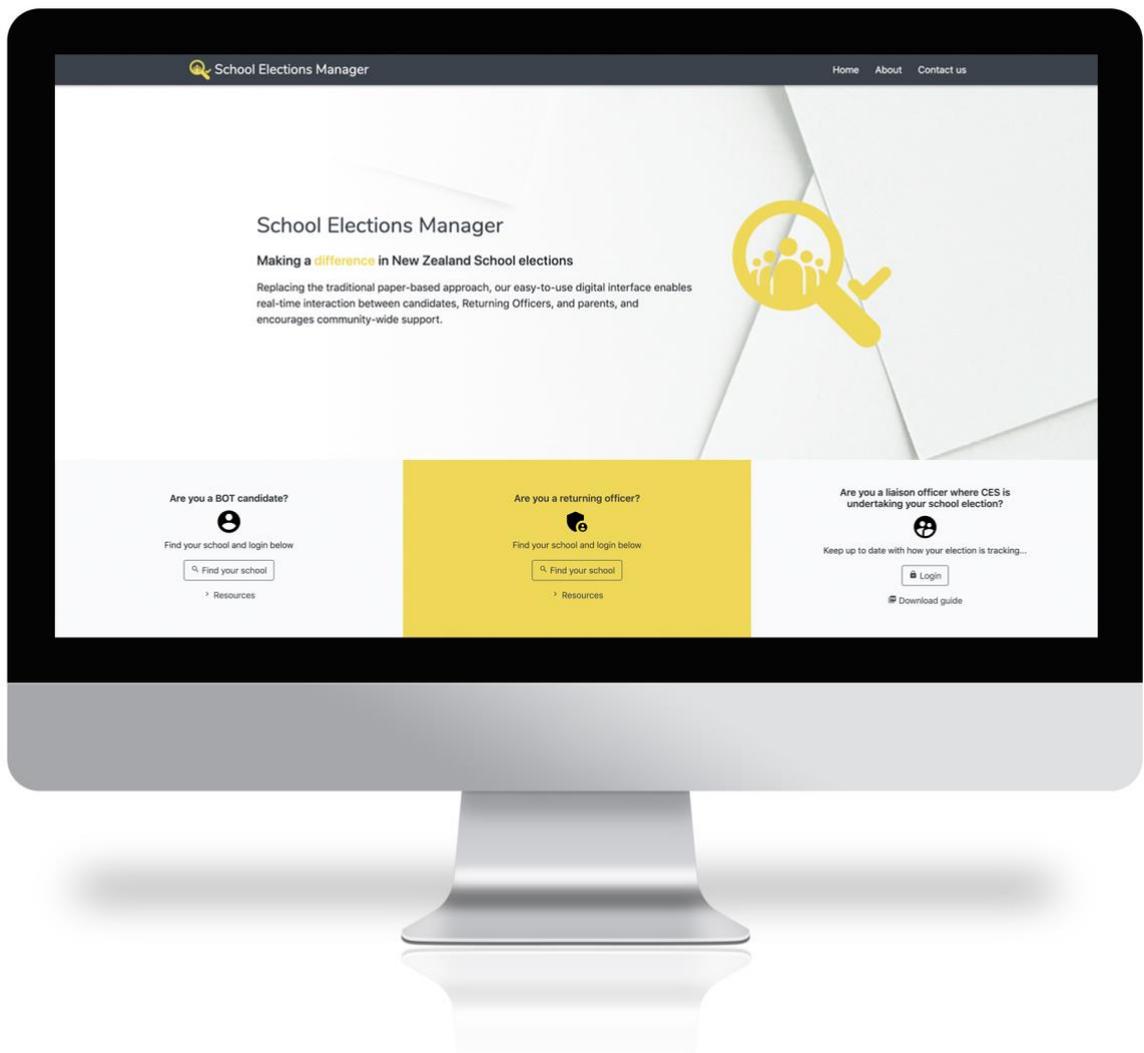
# 1. Accessing your Election Dashboard

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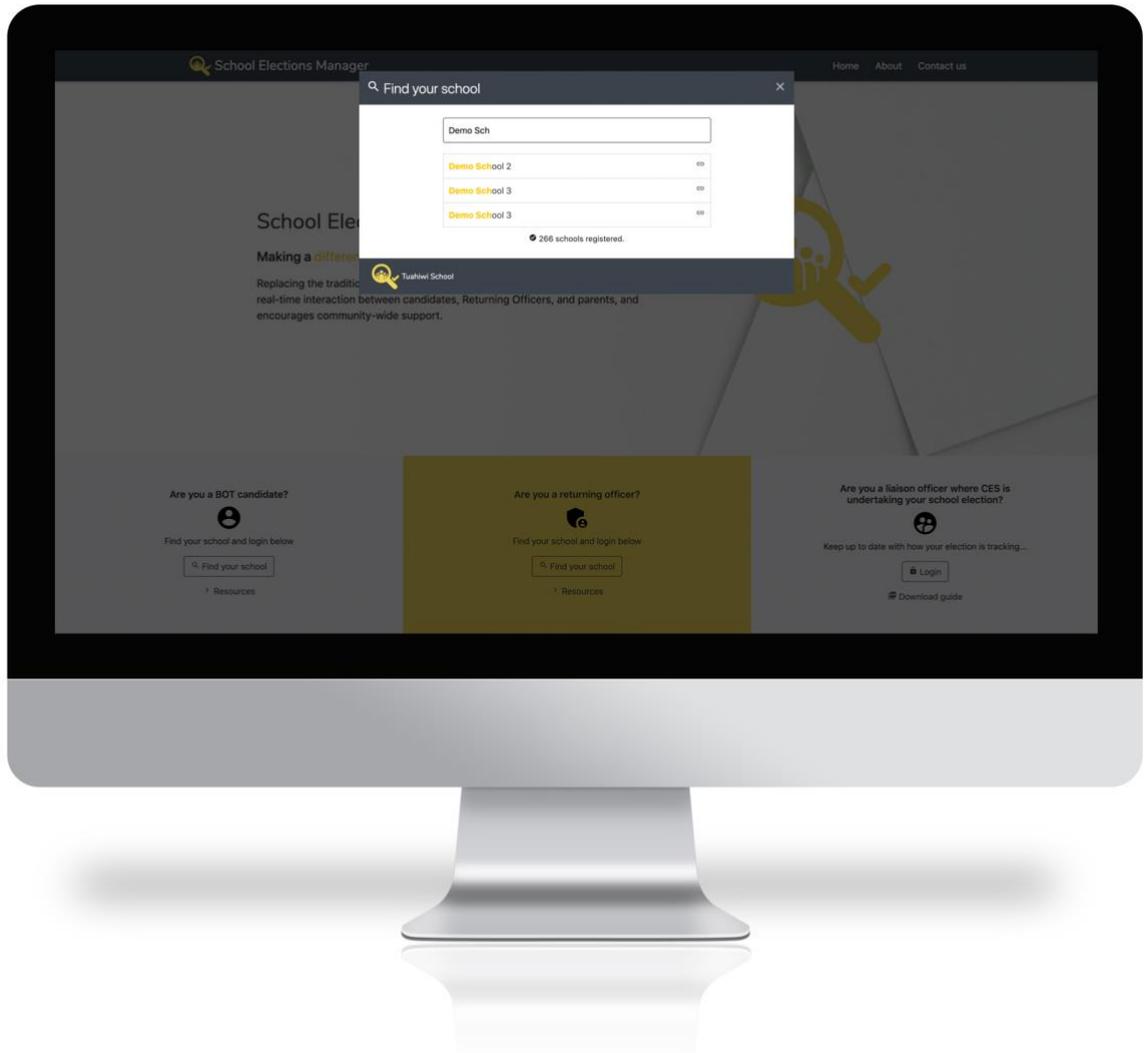
Once your registration is approved by the School Elections Manager team you will receive email confirmation with access to your election website and dashboard.

From your dashboard you will be able to set up and manage your school's election.

1. Click on **Find your school** in the middle of the School Elections Manager homepage.



2. Type your school name into the pop-up box and then select it from the list.  
This will take you to your school's election homepage.

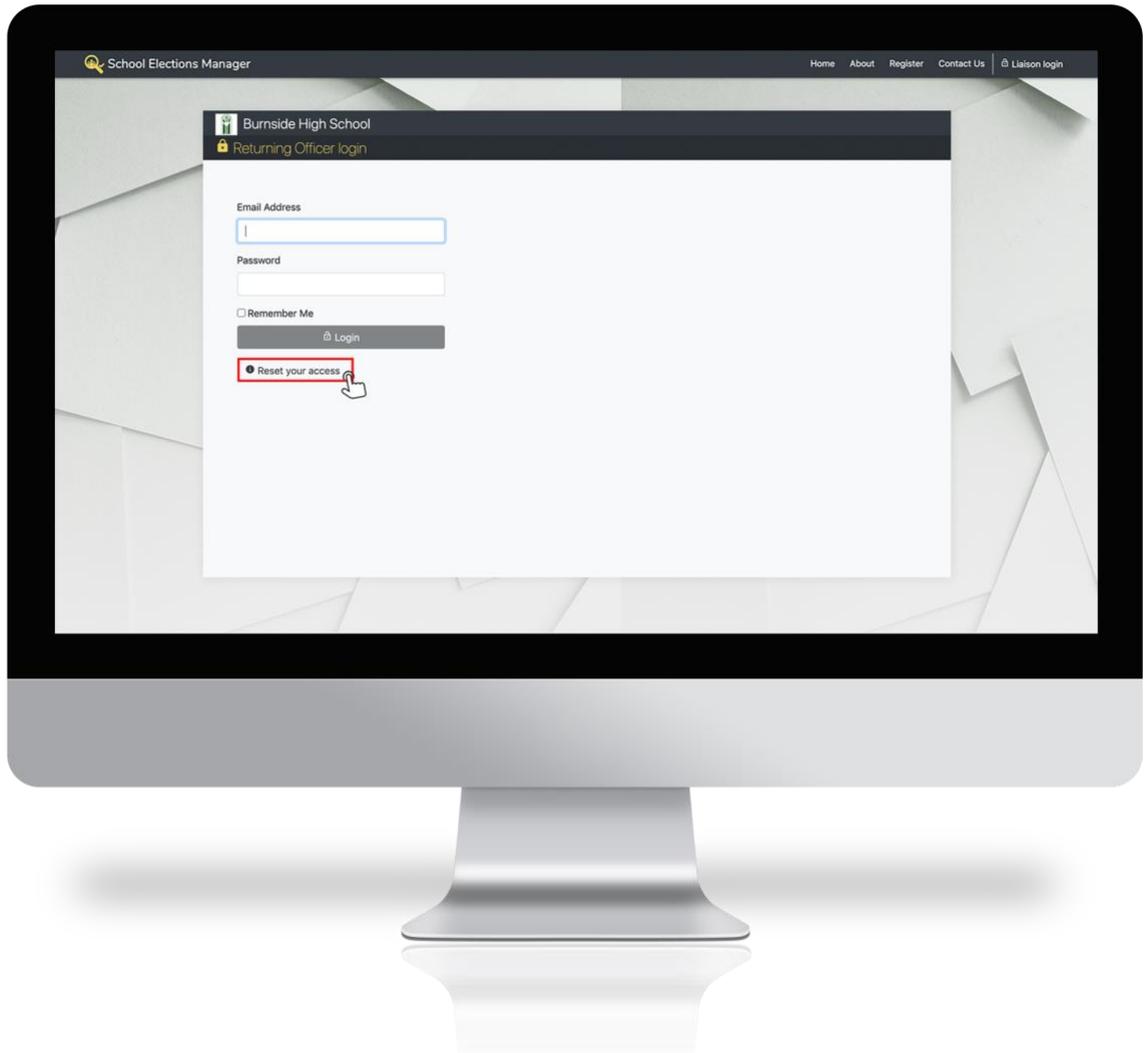


3. To log into your election dashboard, scroll down, and click on **RO login** in the footer.



4. The first time you login you will need to set up your password.

To do this (and to change your password at any time in the future) click on **Reset your access** at the bottom of the login form.



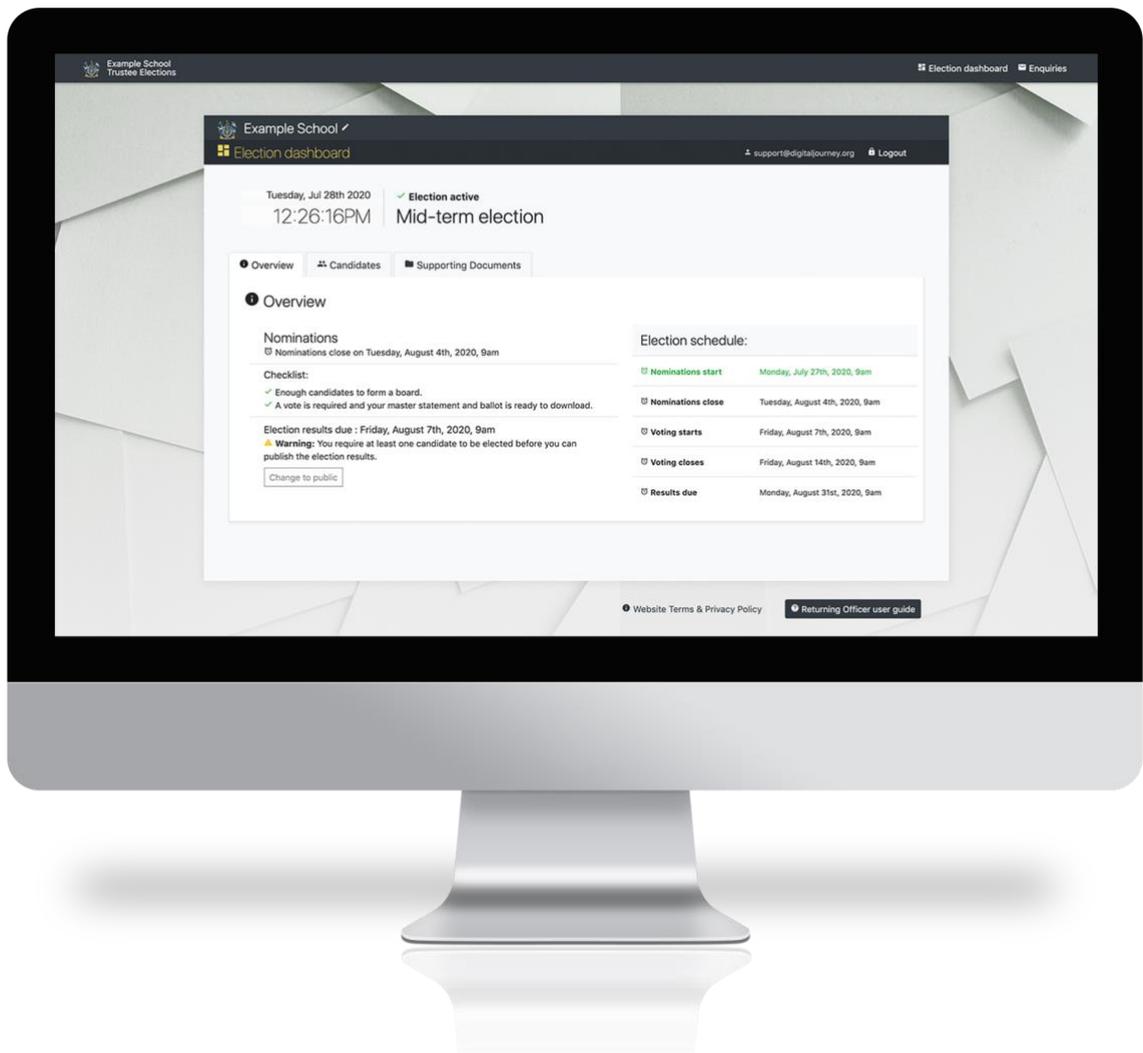
Then enter the email address you provided in your contact information (**this email address should be the same as provided to CES on your election sign up form**) and you will be emailed a password reset link. Once you've set up your password, you will be taken to your Election dashboard.

## 2. Understanding your Election Dashboard

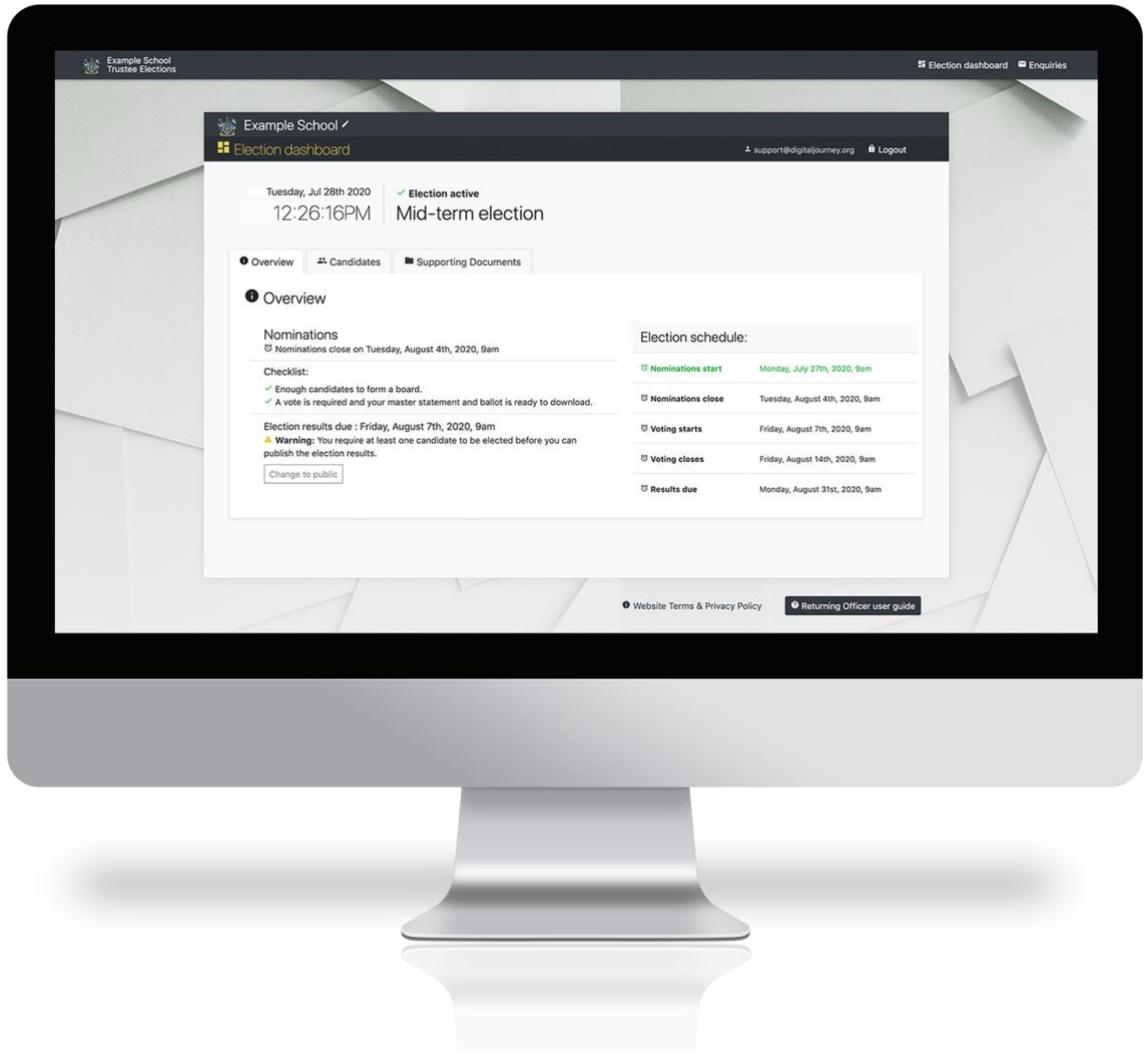
Once your election is activated, you will see live information about your election in your Election dashboard.

This information includes:

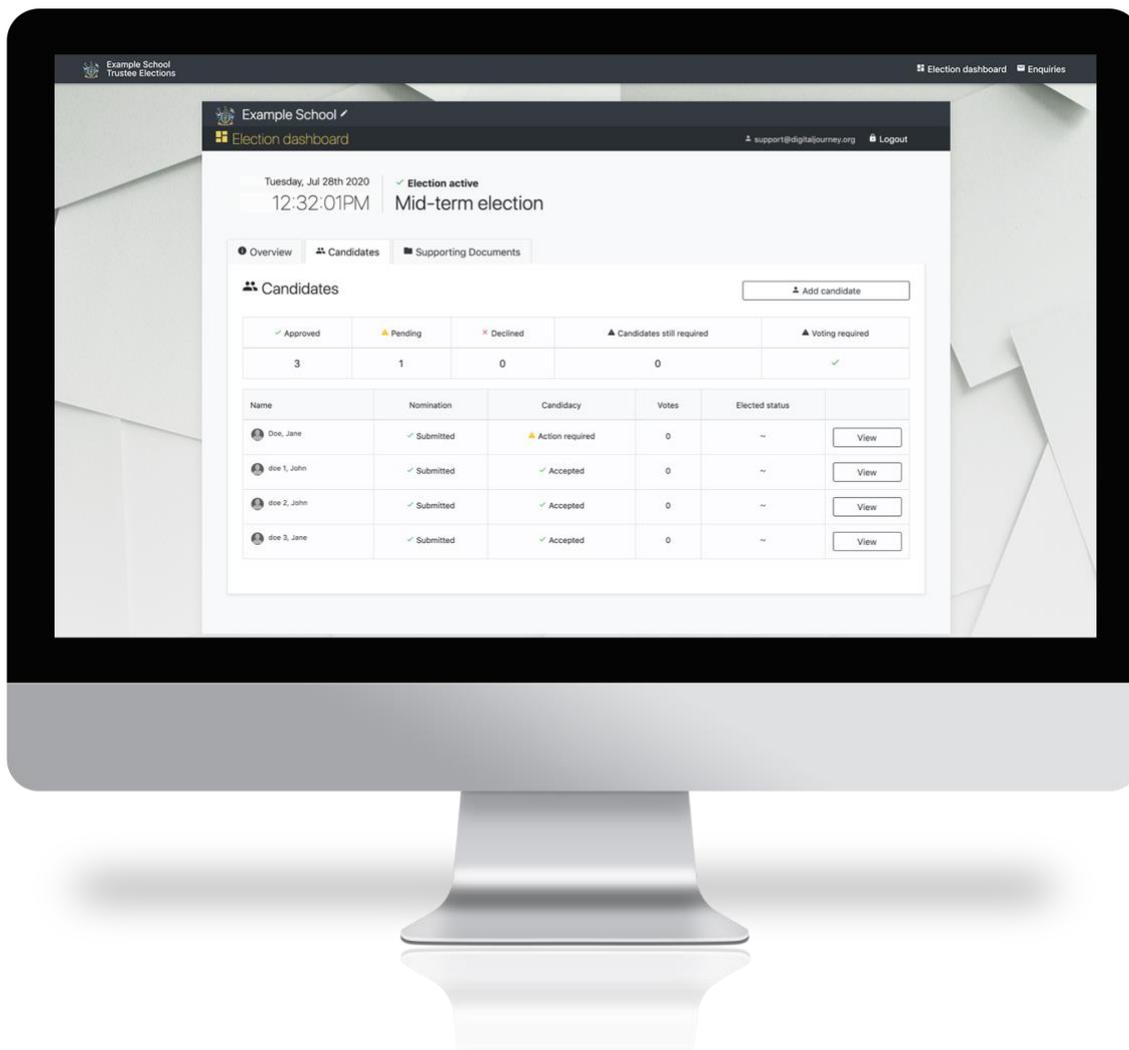
- **Your election summary** - dates for nominations, voting and results etc.



- **Election status** - election objectives and whether they have been achieved. For example, whether the minimum number of candidates have been met.



- **Candidates summary** - number of candidates approved, pending your approval, and declined etc.



### **Sending out Nomination Forms**

Template documents are available in the Portal for the Returning Officer to use to send out Nomination cover letters and Nomination forms (see page 12). The relevant sections will require completion by the Returning Officer. These forms are now able to be e mailed out to the caregiver community. The Returning Officer should also construct a newsletter advertisement advising the caregiver community that documents will be e mailed out to them .The advertisement should also contain the dates of the election process, when nominations close and noting that nomination forms are available at the school office.

### **Nomination Cover Letter**

This is a letter inviting candidates to submit a nomination form. It also stipulates the criteria for eligibility, contains the election schedule and other important election information.

### **Nomination Form**

This is for candidates to fill in and return to you. We strongly encourage candidates to register and submit a nomination online. However this paper based nomination form will assist the Returning Officer in adding these candidates manually.

### 3. Managing the Nomination Stage

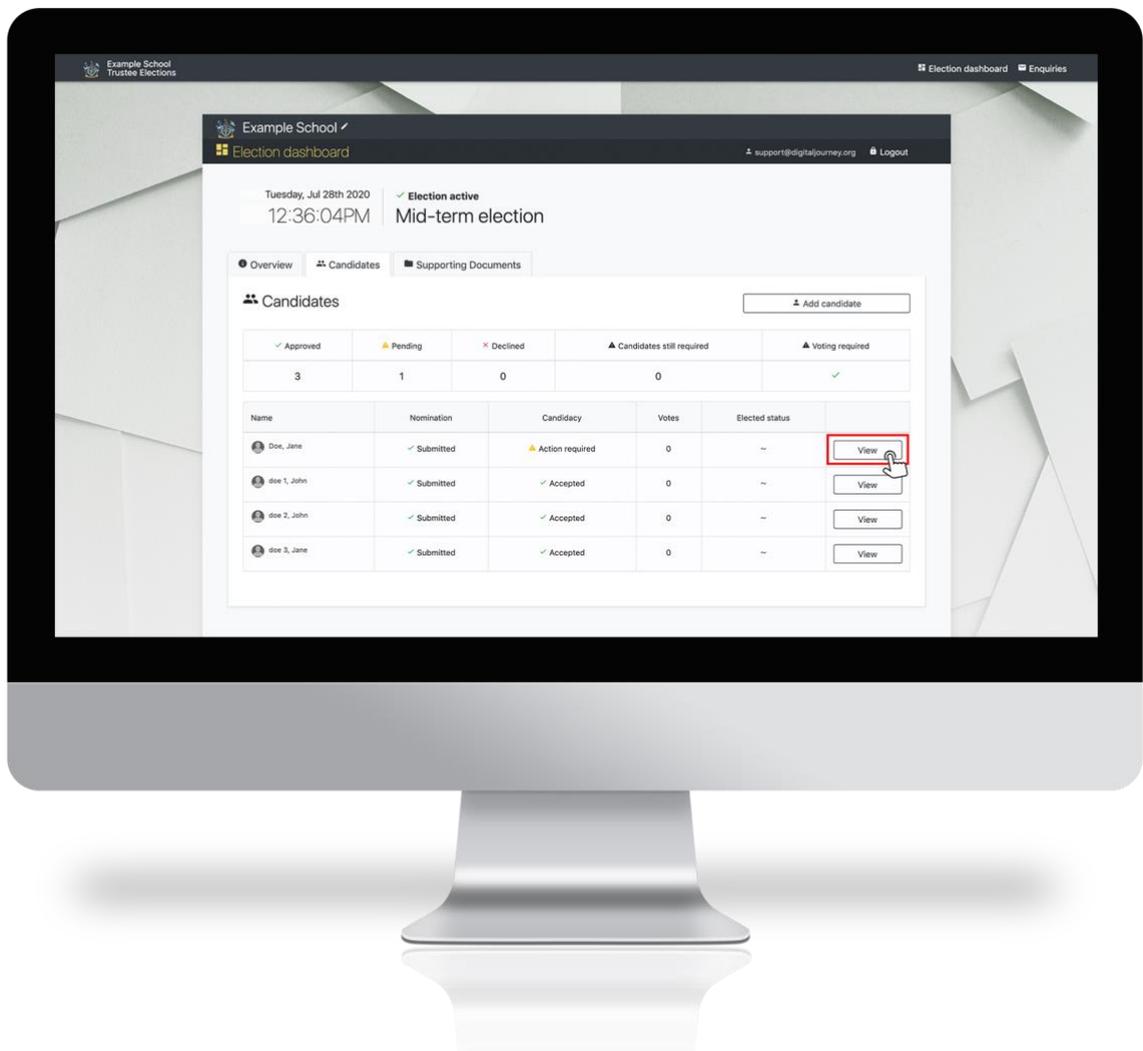
This period is the most active time for a Returning Officer (RO). You will be responsible for reviewing and approving or declining nominations that are submitted.

Candidate nominations will be available for you to review as soon as they are submitted by the candidate. Ensure you login regularly so you can review the nominations promptly.

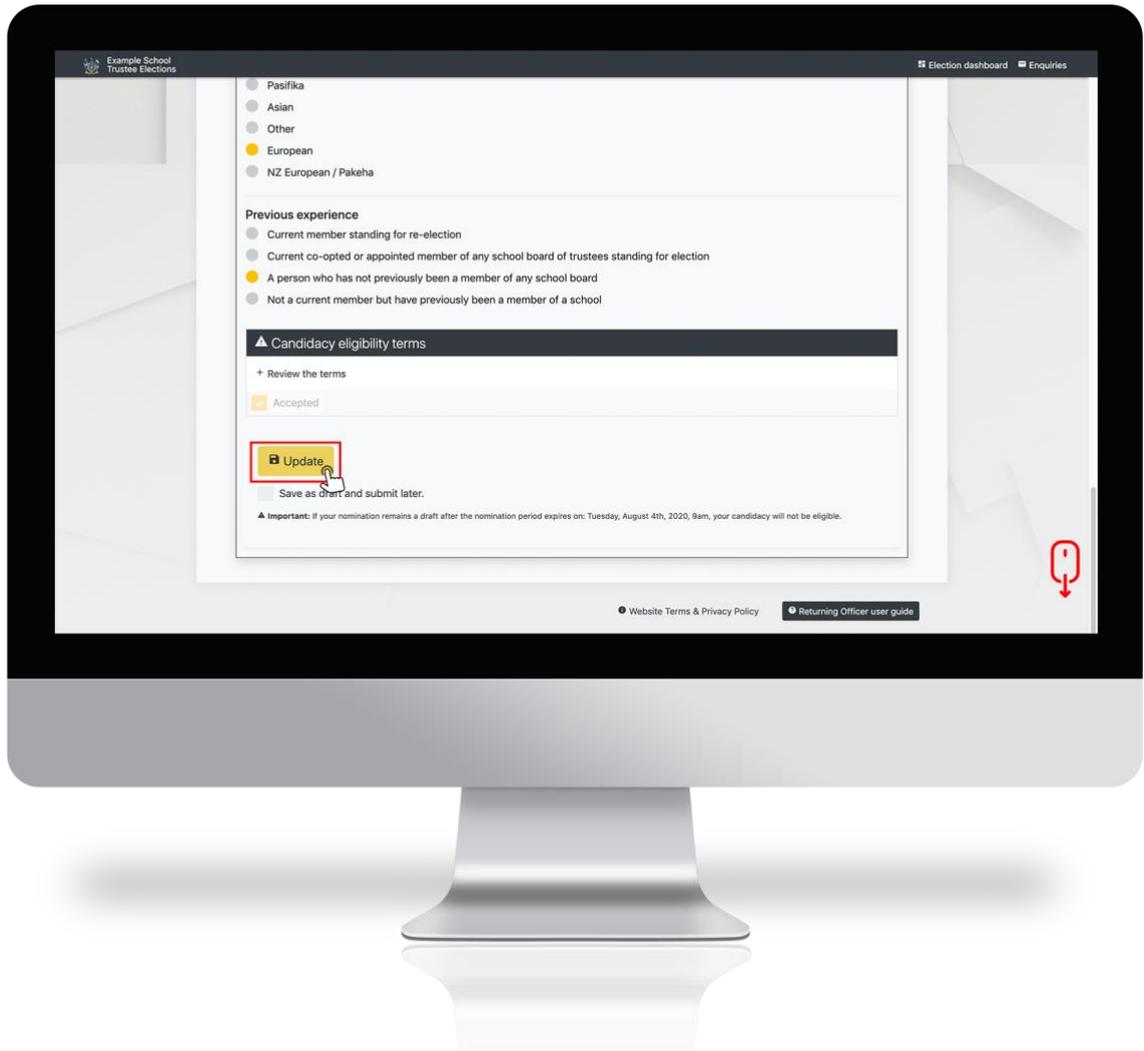
A list of candidates and their status will appear on your Election Dashboard in the Candidates section. Those that are pending your decision will be marked with **Action required**.

To approve or decline a candidate's nomination:

1. Click **View** on the same line as the candidate's name to be taken through to their nomination submission form.

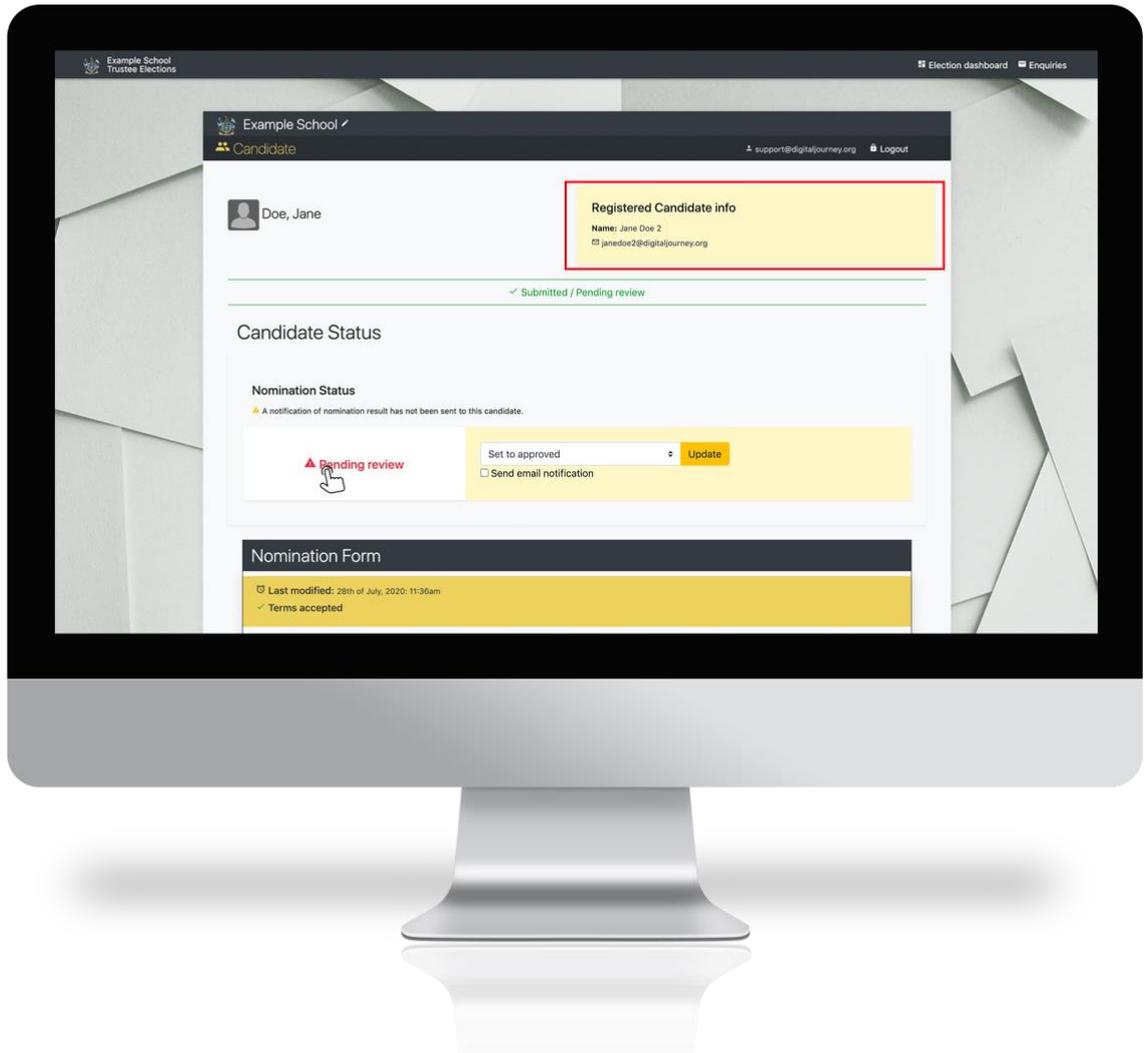


2. Review the candidate's nomination and confirm eligibility and make any necessary edits. You will need to save any changes by clicking the **Update** button at the bottom of the page.



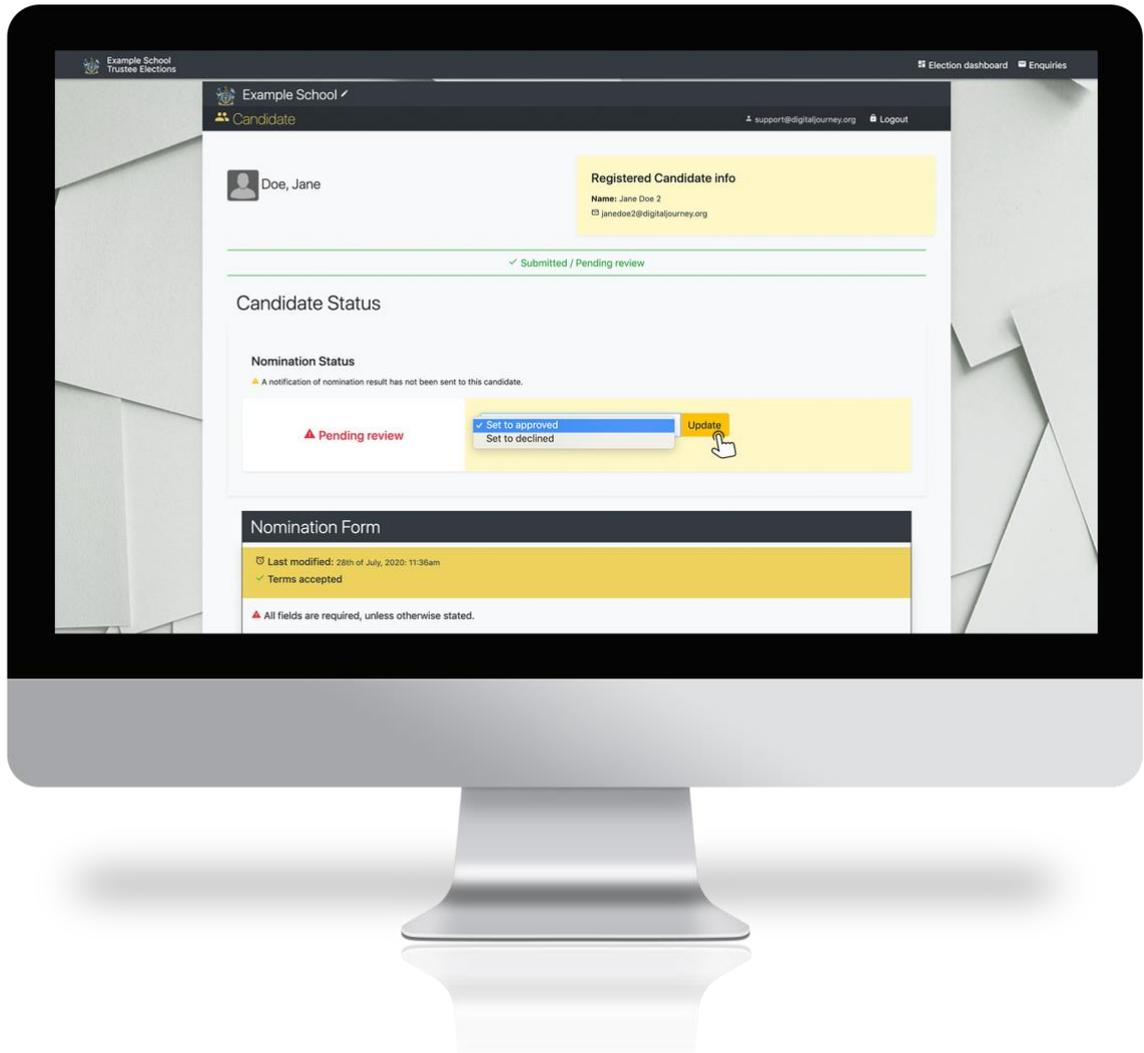
You can find the candidate's contact information in the top right of the page if you need to contact them to follow up on any details.

Candidates can set their nomination to draft and submit when they are ready. Once you approve a candidate the nomination is locked and cannot be changed. You are able to unlock where a candidate requires changes by changing the candidate's status.



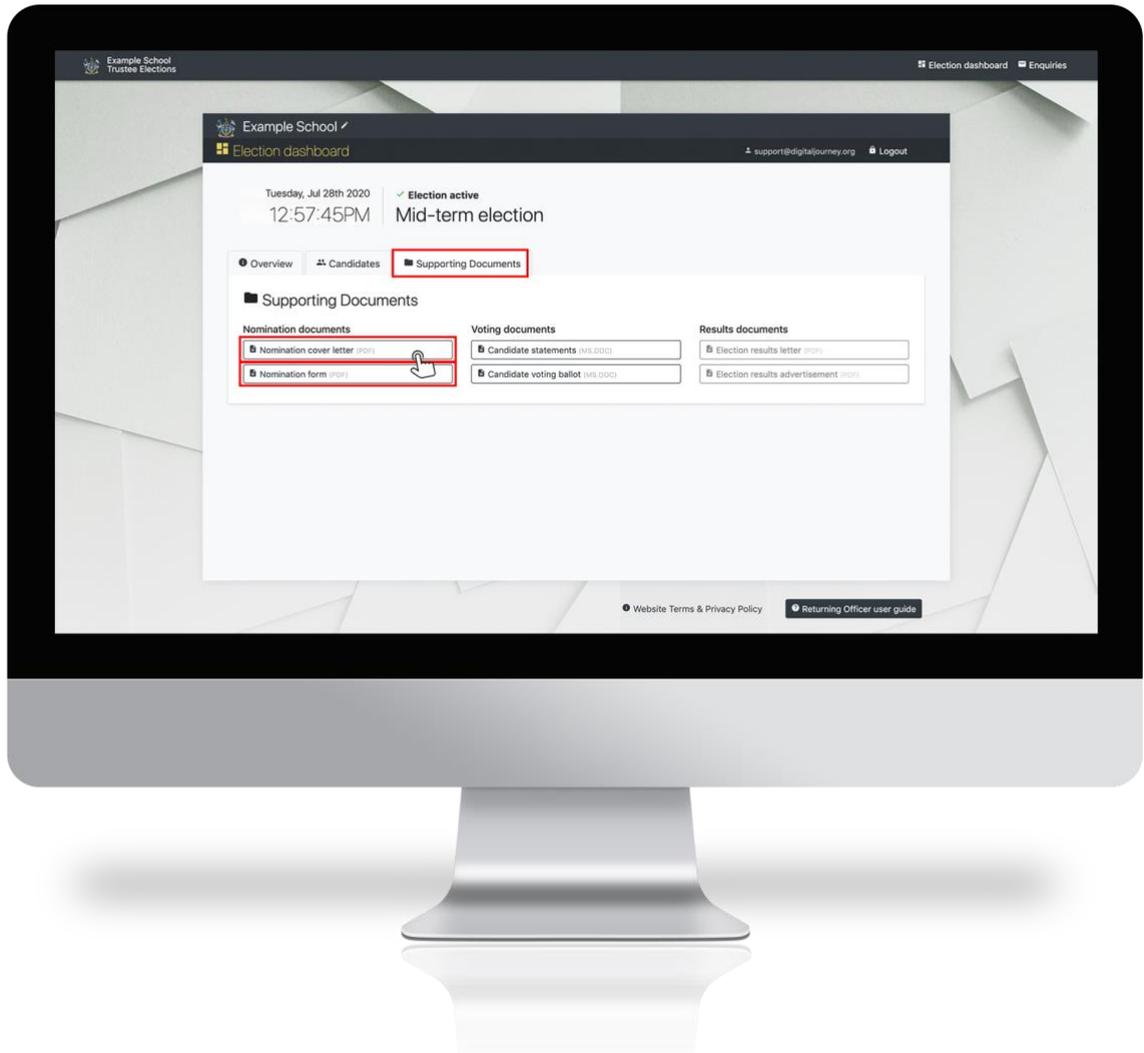
**Note:** Once a candidate has been approved or declined, you will be unable to edit any of their information.

3. Approve or decline the nomination using the drop-down menu.



You can change a candidate's status at any time by going back into their nomination page and updating their status.

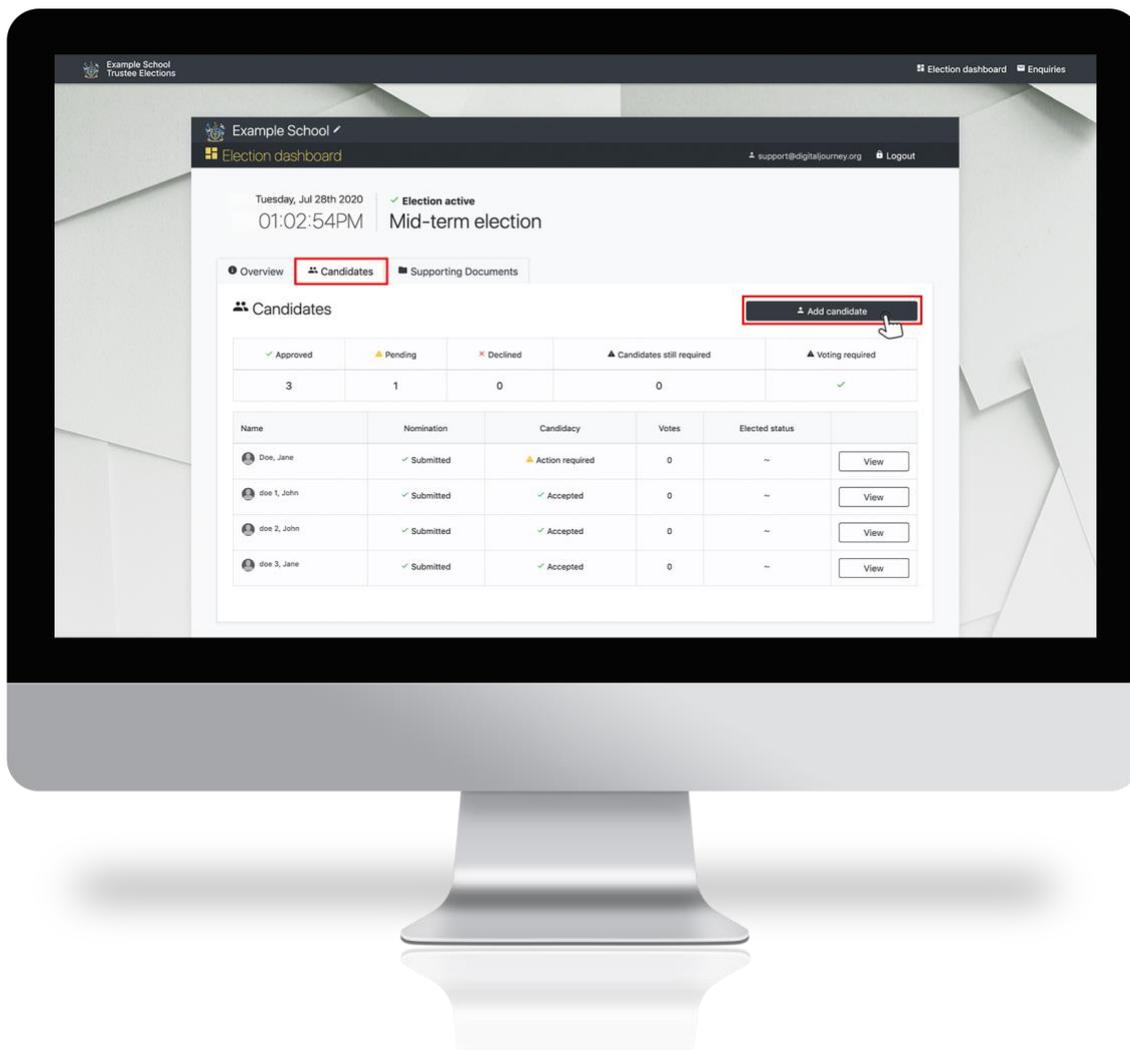
You can also retract a nomination by selecting **Set to declined**.



## 4. Adding/editing a Candidate

In some circumstances you will have to add candidates into the system manually. In most cases this is when you have received paper forms from your candidates. In other circumstances a candidate might want you to do this for them while they are with you.

We have made it very easy to add a new candidate. A list of candidates and their status will appear on your Election Dashboard in the Candidates section.



Start by clicking the Candidates tab and then click the **Add candidate** button. This opens a blank nomination form for you to fill out.

**Tip:** Make sure that the candidate is eligible and check section 103. Accept the checkbox before saving.

Complete candidate information. *(Please note: All fields are required)*

If for some reason you can't complete the candidate information and you want come back to it later, check the box at the bottom of the page that gives you the option to **Save as a Draft**.

**Important:** Make sure that you un-check the **Save as a draft** checkbox and re-submit the nomination if you want to set the candidate as **Accepted**.

**Tip:** If you receive a paper-based candidate profile/nomination, we suggest you utilise an online service like **PDF To Go** to break the PDF and create a word document. This will convert it into text so you can copy and paste it when you add their candidacy to the website.

<https://www.pdf2go.com/pdf-to-word>

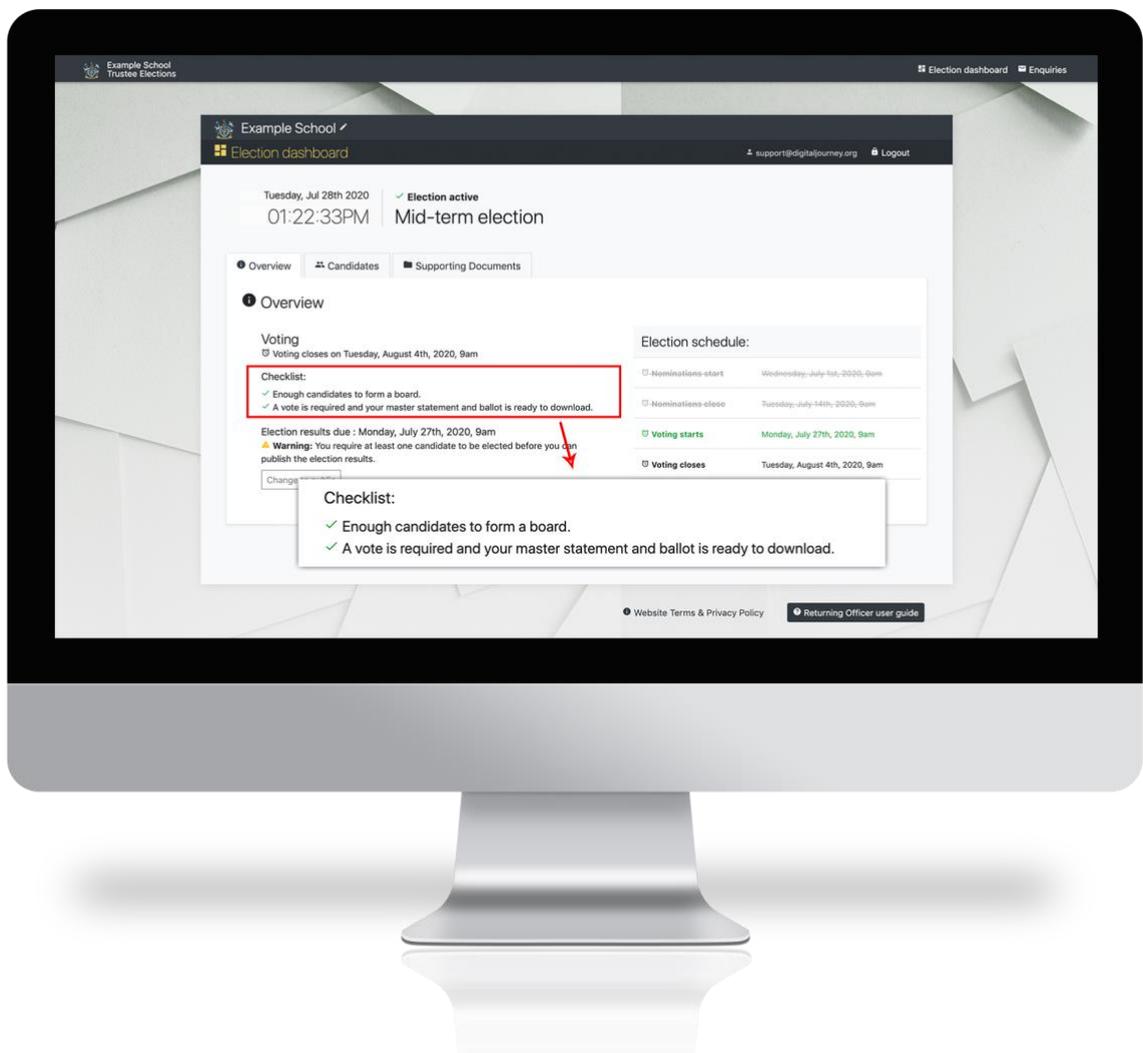
**Please do check the text contents to make sure they have been converted correctly.**

If you would like CES to transcribe your paper-based nominations into the system, on your behalf, please contact us. This service is calculated at \$35 per candidate.

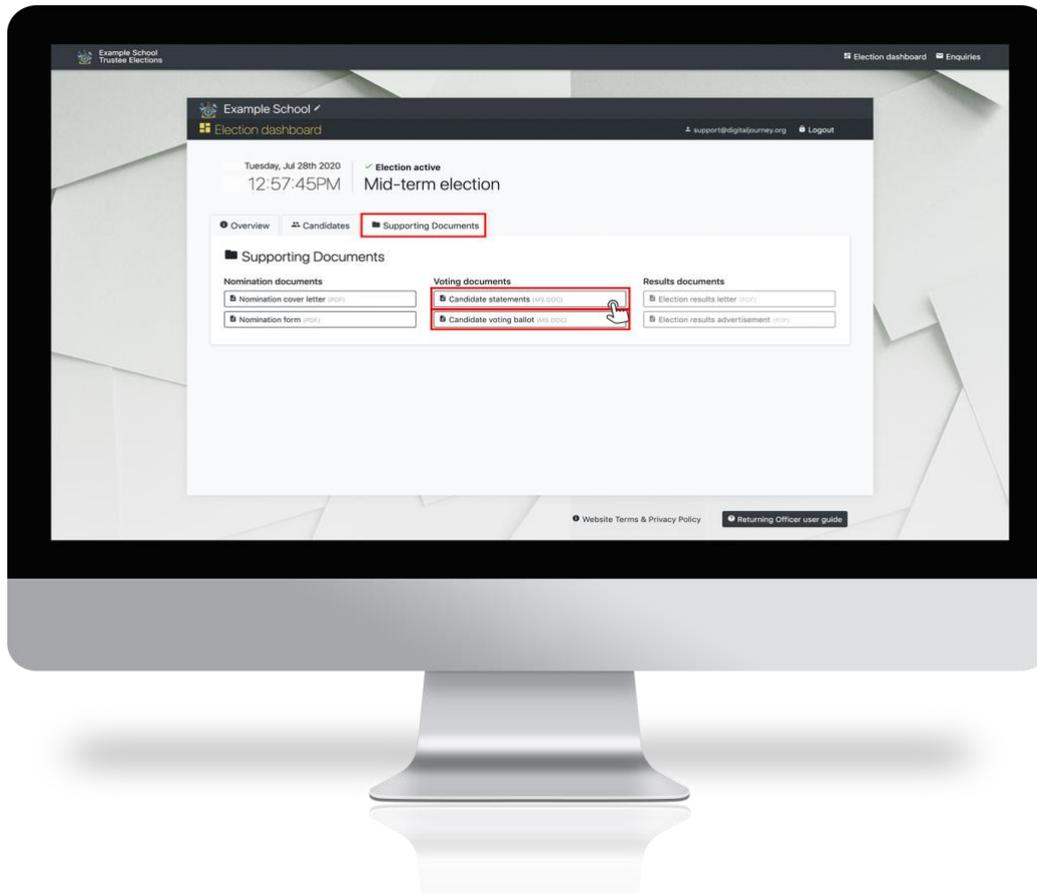
## 5. Managing the Voting Stage

After the nomination stage has closed, your election status box will notify you of one of three possible outcomes:

1. You don't have enough candidates to fill the available BOT spaces. In this case you will not need to run a vote and you can proceed with **Step 6: Publishing the election results**.
2. You have exactly the right number of candidates to fill the BOT spaces. In this case you will not need to run a vote and you can proceed with **Step 6: Publishing the election results**.
3. You have more candidates than BOT spaces available and you will need to proceed with a vote.



## Supporting documents



The following documents, found in the **Elections documents** section at the bottom of your dashboard, are designed to help you manage the voting stage:

### **Voting cover letter**

This document is a standard voting cover letter for you to edit. This document should be accompanied by the voting paper and the candidate statements.

### **Candidate statements document**

This document is available once the nominations close and before voting begins. It collates all the approved candidate's statements into one downloadable document to be used to inform your voting community of their options. This document should be accompanied by the Candidate voting paper.

### **Candidate voting paper**

This document is a standard voting paper.

You can download and print as many copies as you need and post to parents/caregivers them out to stakeholders who are eligible to vote. These can be completed and handed back to the school office.

**Important:** The voting paper that you can download is a sample copy only. You will need to edit the School Name, MOE number, Required Representatives and School Address before printing and distributing to your roll.

## Board of Trustees Election

XXX School

111

Friday 19<sup>th</sup> June 2020

[School Name]

[School Profile Number]

[Date of Election]

### PARENT REPRESENTATIVES VOTING PAPER

This voting paper may be used for any/all elections for parent representatives, apart from a triennial election when a board opts into the mid-term election cycle

You may vote for up to **1** candidate  
by inserting a tick against their name



vote here



vote here





















Your vote will not be counted unless this paper is delivered or posted to the Returning Officer in the envelope which was included with this voting paper. If you post this paper your vote will not be counted unless it is posted to: **THE RETURNING OFFICER, PO BOX 414, CHRISTCHURCH** and postmarked before noon on the day of the election and received by the Returning Officer not later than 5 days after the day of the election. If you deliver this paper or have it delivered your vote will not be counted unless the paper is delivered to: **THE RETURNING OFFICER, PO BOX 414, CHRISTCHURCH** before noon on the day of the election.



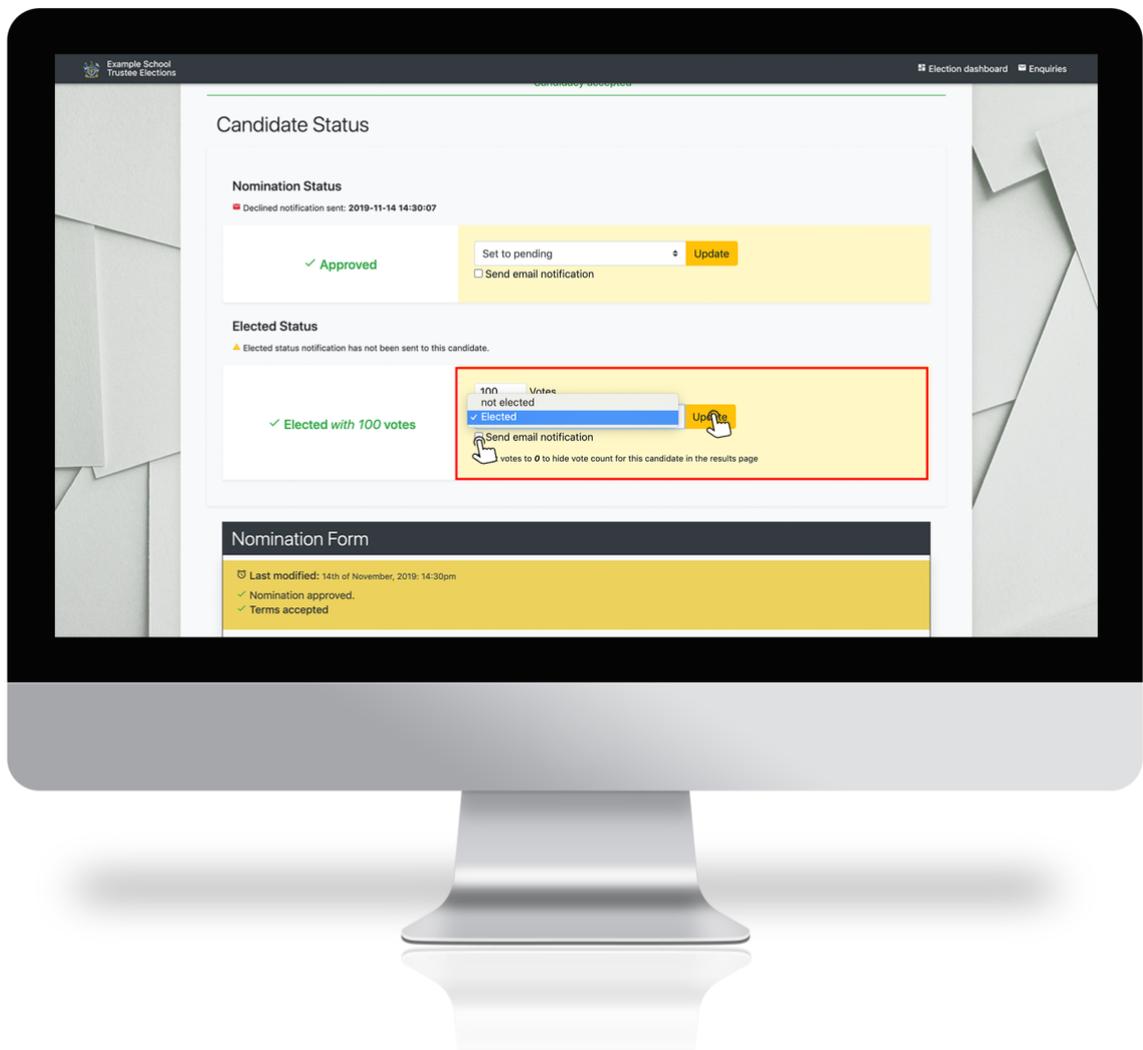
## 6. Publishing the Election Results

Once voting has finished the RO is required to review and publish the election results and inform the candidates of whether they were successful or not.

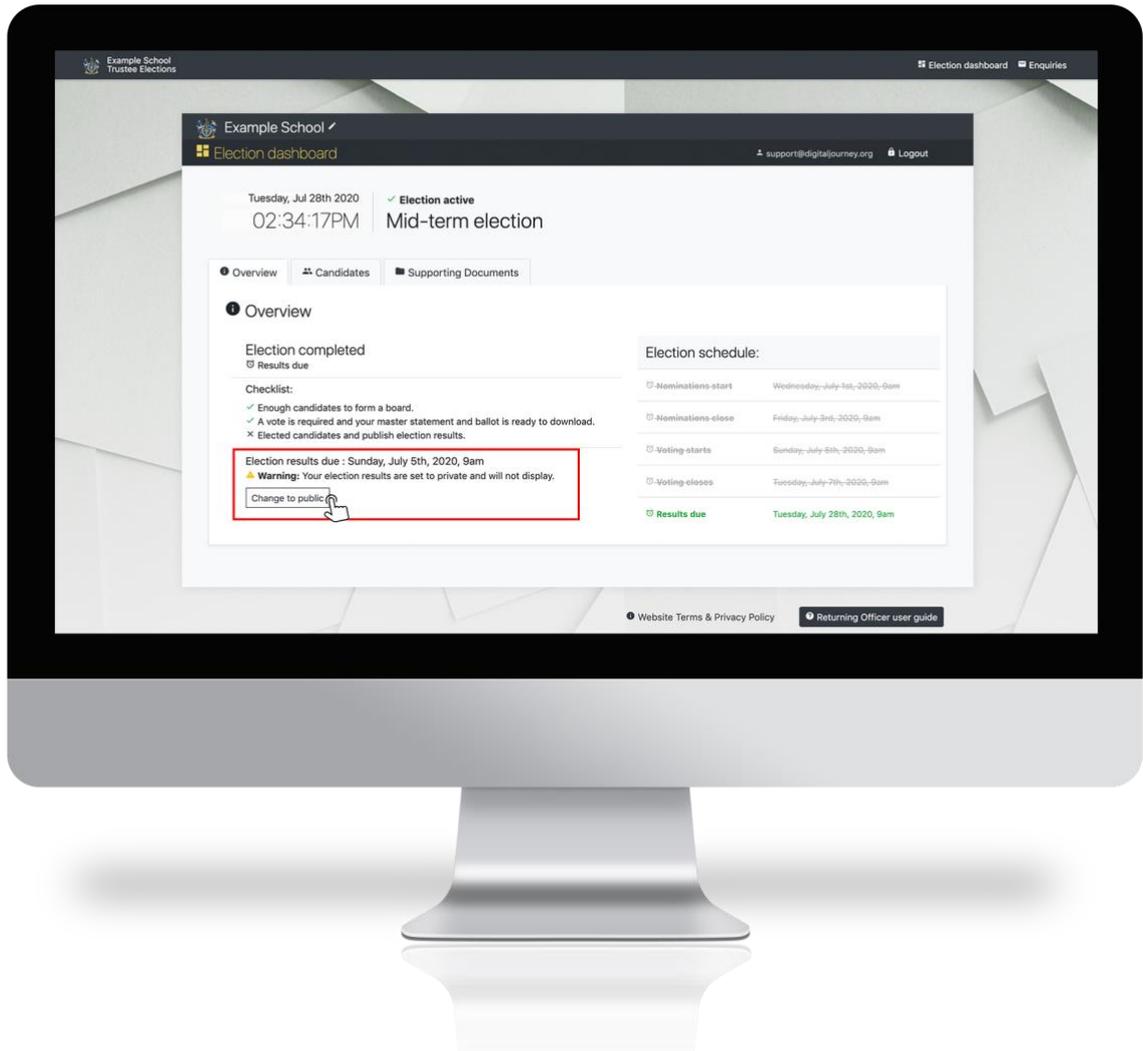
1. Count the votes and review the results
2. Individually update each candidate's elected status in your dashboard

Access each candidate's nomination form, find the **Elected status** section, and set their status as either **Elected** or **Not elected**.

You can enter the number of votes they received (if you had a vote) and choose to send them an email notification of their result.



3. Publish election results by setting the results status on your election dashboard to **Change to public**



## Supporting documents

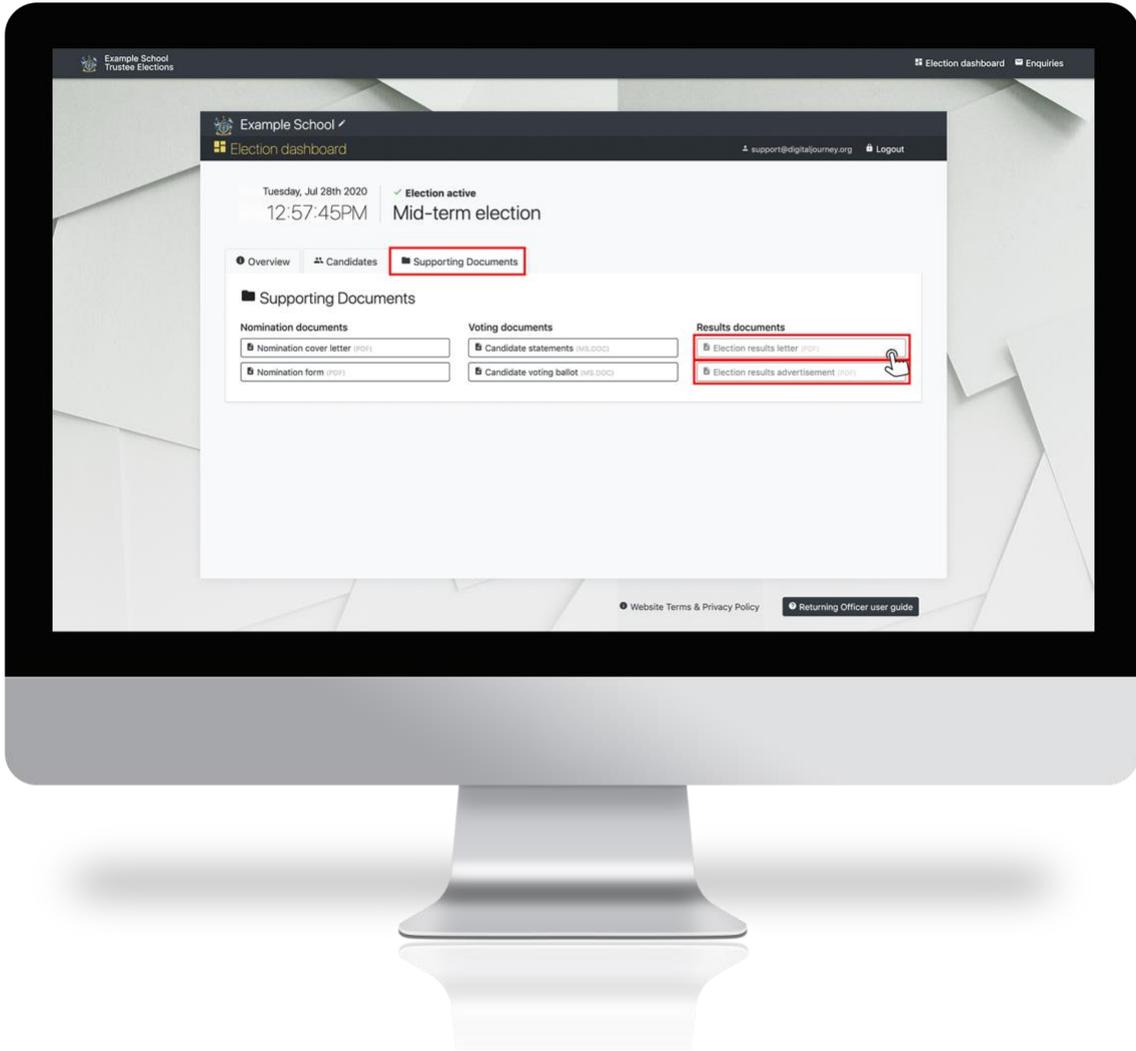
The following documents, found in the **Elections documents** section at the bottom of your dashboard, will become available once you have confirmed the election results:

### Elected candidates' letter

This letter can be sent to the candidates before submitting the results to the public. It lists the successful and un-successful candidates as well as the voting numbers.

### Results advertisement

This document is an official statements that is required to be sent to a community publication, announcing the new board of trustees.



## 7. Dealing with Enquiries

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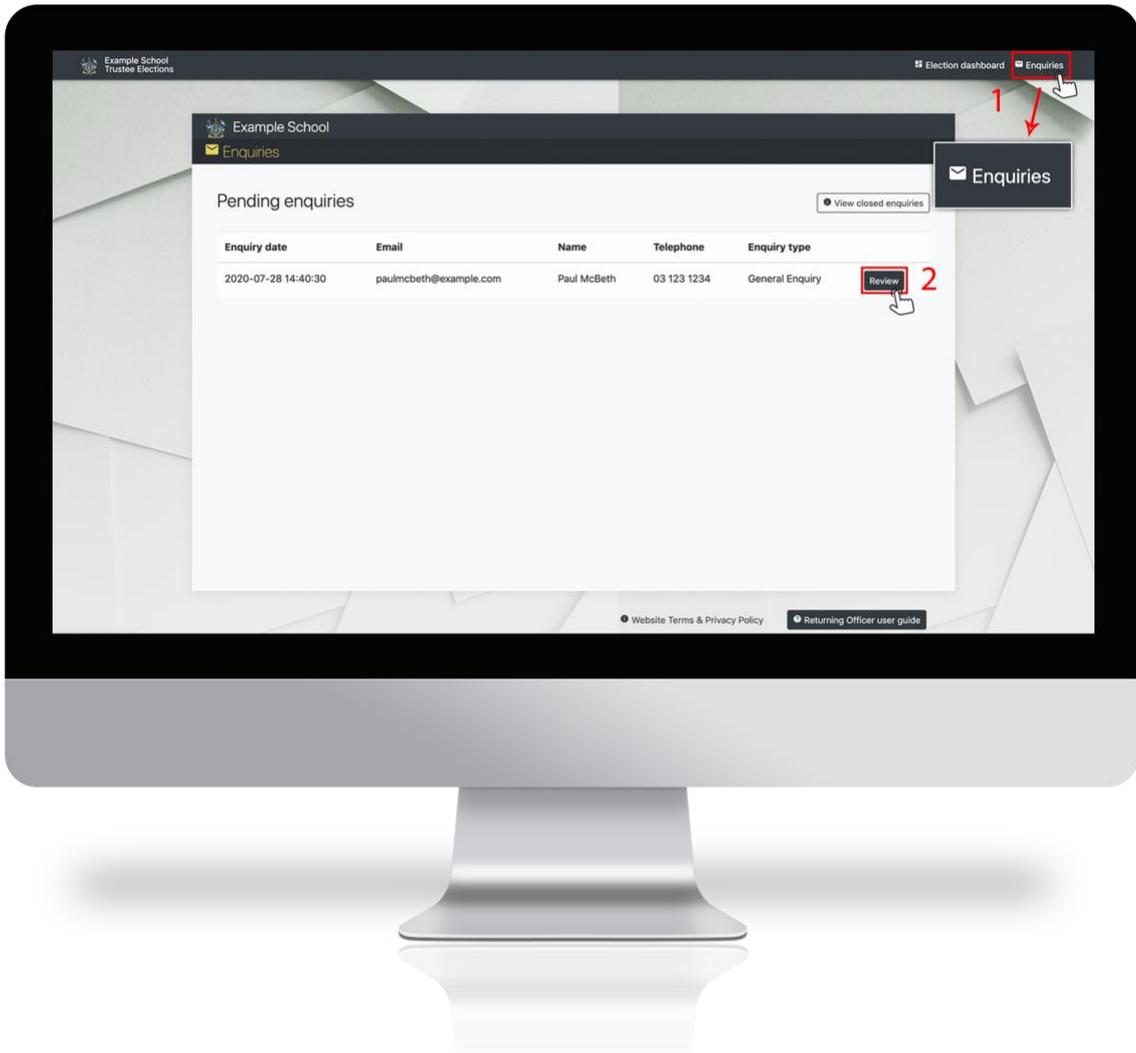
People are able to submit enquiries to the Returning Officer by clicking on the **Contact Returning Officer** button, in the menu of your election website's homepage. This will take them to a submission form where they can enquire about their eligibility or other election information.

Candidates who have registered can submit enquiries to the RO from inside their personal candidate dashboard. When submitting an enquiry form a candidate can select one of the below reasons for their enquiry:

- Their eligibility
- Retract a nomination
- Update nomination information

You can review and act on any of the above enquiries in the RO administrator by doing the following:

1. Click **Enquiries** in the top navigation menu. This will take you to a list (if available) of pending enquiries that are ordered by date.
2. You can review any enquiry by selecting the **Review** button. This takes you to enquiry details where you will find contact information for the person who has submitted an enquiry. There is also a link to the candidate with the option to change or edit their information.



**Tip:** When you have dealt with an enquiry you can close the enquiry by clicking on the **Close Enquiry** button to change the status from pending. When all the enquiries are dealt with the pending list will be clear. You can review closed enquiries by clicking **View closed enquiries** above the pending enquiries list.

