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**Item No. 12.4.2**  
**Audit & Finance Standing Committee**  
**September 19, 2018**

**TO:** Chair and Members of Audit & Finance Standing Committee

Original Signed

**SUBMITTED BY:**

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John Traves Q.C. Legal, Municipal Clerk & External Affairs

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Jacques Dubé, Chief Administrative Officer

**DATE:** August 14, 2018

**SUBJECT:** **Election 2020 Training & Engagement: Authorization for Reserve  
Withdrawal**

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**ORIGIN**

The Election Office has begun planning for the 2020 regular election, and a withdrawal from the Election Reserve (Q511) is required to ensure key poll location workers are provided with enhanced training to provide excellent customer service. This withdrawal will also be used to begin an engagement strategy during 2019 to encourage interest in the municipal election process.

**LEGISLATIVE AUTHORITY**

Administrative Order One, *The Procedure of the Council Administrative Order*, Schedule 2, section 8(g):

The Audit and Finance Standing Committee shall review and make recommendations on proposals coming to the Council outside of the annual budget or tender process including:

...

(g) the creation or modification of reserves and withdrawals not approved in the approved budget.

Administrative Order 2014-015-ADM, the *Financial Reserves Administrative Order*, sections 5 and 6:

5. The Audit and Finance Standing Committee shall review and recommend to the Council for its consideration all impacts to the Reserves.
6. The Chief Administrative Officer may recommend to Council that Reserve funds be expended.

**Recommendation on next page**

*Municipal Elections Act*, R.S.N.S. 1989, c. 300, section 6:

6. The returning officer shall:

- ...
- (b) appoint such enumerators, revising officers, deputy returning officers, poll clerks and other election officers as may be necessary;
- ...
- (e) instruct the election officers in the effective execution of their duties;
- (f) require election officers to conduct themselves with fairness and impartiality and in compliance with this Act;

## **RECOMMENDATION**

It is recommended that the Audit and Finance Standing Committee recommend that Halifax Regional Council authorize the withdrawal of amounts not to exceed \$15,000 from Q511 Municipal Election Reserve for 2018/19 to fund expenses related to the implementation of a training strategy and an engagement strategy in advance of the 2020 election.

## **BACKGROUND**

The costs associated with elections are funded through the Municipal Election Reserve (Q511), which accumulates over several years through annual funding contributions to the reserve. Funds from the Municipal Election Reserve may be allocated for initiatives deemed necessary by the Election Office to ensure critical components remain current and are in place for special and regular elections. Corporate procedure requires that the Audit and Finance Standing Committee oversee the administration of reserves and therefore a request to withdraw from the Municipal Election Reserve (Q511) is before Committee.

The Election Office has begun planning for the next regular municipal election scheduled for October 17, 2020. Specifically, the Election Office is focusing on rolling out a training and engagement strategy for 2019 to ensure that we have qualified and knowledgeable candidates and poll workers involved in the election.

### *Supervisory Deputy Returning Officers (SDROs)*

Poll workers provide vital election services to citizens in a complex environment. Their roles are to ensure compliance with the processes in the *Municipal Elections Act* (MEA) and relevant HRM by-laws. Specifically, SDROs are expected to manage polling locations with two or more polling tables.

In-person training of temporary election workers, including SDROs, deputy returning officers, and poll clerks, is a large component of election planning. In 2016, this training took place in the months immediately preceding the election. The Election Office also worked to place training documents online, to reinforce the information presented during in-person training. Most election workers were provided with one training session while the SDROs were provided with two training sessions. Given the high-paced nature of elections, SDROs must develop a working knowledge of the MEA and related HRM by-laws to better inform their decisions and their interactions with customers (e.g., voters, candidates, and their fellow poll workers).

The SDRO training preceding the 2016 election focused on providing the necessary tools to achieve these expectations; however, comments received by both the SDROs and the Election Area Officers, who supervised SDROs, suggested that further training on customer service, relevant legislation, and management techniques would be valuable. SDROs were expected to provide a higher-level of leadership and expertise with only slightly more training than the election workers who they oversee.

### *Public Engagement*

Candidate information sessions, in the lead-up to elections present citizens with the necessary information to decide on if and how they would like to be involved in municipal government. Specifically, these sessions ensure that potential candidates are aware of the processes in the *Municipal Elections Act* (MEA) and

relevant HRM by-laws before deciding whether to run for a position on Council. Candidate information sessions are vital to ensuring all citizens interested in the election process are knowledgeable of the various components required to run for office, which may differ every election depending on changes to relevant legislation. In addition, the Elections Office facilitated broad engagement throughout the summer leading into fall 2016 to encourage residents to check the voters' list and to vote. Based on feedback during the 2016 election, the Election Office will initiate public engagement in 2019 in advance of the 2020 Municipal Election, slated for October 17, 2020.

## **DISCUSSION**

### **Supervisory Deputy Returning Officers (SDROs)**

Proactively hiring and retaining a cache of SDROs will permit the Election Office to be election ready for a Special Election, and to strategically place these individuals in key locations for 2020. The Election Office goal to achieve exemplary engagement with customers will carry forward to the 2020 Municipal Election. The withdrawal from reserve Q511 is recommended to enable the Election Office to train a small number of SDROs and engage with individuals interested in becoming more involved with the municipality in advance of the 2020 Municipal Election.

**Training:** The Election Office recommends that a withdrawal from the Municipal Election Reserve be used to develop and implement enhanced SDRO training in 2018/19. This training will allow the Election Office to focus on building expertise on relevant legislation and procedures, managing a polling location, and interacting with customers. By hiring 35 SDROs in 2018, a core group of election workers can build subject matter expertise and, subsequently, be placed strategically in polling locations where they will be the most effective (e.g., larger locations). In addition, the Election Office recommends improving the accessibility of training by developing more online materials in 2018/19.

**Competencies:** By hiring in advance, the Election Office will consider the required SDRO skillsets and competencies to effectively manage the provision of an essential government service. The Election Office will work with Human Resources to ensure that hiring practices align with Human Resource's policies and guidelines. The Election Office will consider candidates from diverse groups who have relevant experience including but not limited to experiences in management, government, law, and/or hospitality.

**Timeline:** In 2016, the SDROs were hired by the Election Area Officers based on the applications received through an online form. While this timeline distributed some of the hiring responsibilities, the Election Office is proposing that 35 SDROs be hired in 2018 to allow the Election Office to provide enhanced training.

The extra training days will focus on the following key topics:

- Review of HRM by-laws and the *Municipal Elections Act*
- Review of forms and oaths
- Communicating with Candidates & Agents
- Election Procedures (e.g., opening a poll, counts)
- HRM Core Values
- Lockdown/Emergency Procedures
- Management and Conflict Resolution

### **Public Engagement**

The Election Office is planning a three-phased approach to ensure that residents and potential candidates are informed in advance of the 2020 election.

**Civics 101:** The first phase will begin in Spring 2019 and will feature engagement on a broad level, to provide information on the general inputs into municipal government. This engagement will take on a civic education approach, with a review of services provided by the Municipality, and connecting the benefit and importance of public participation at a local level. The session will provide information on the inputs into

municipal government through (presentations/delegations/public participation), opportunities to serve on a committee, working at a voting location, and running for municipal office. During these sessions staff will also use this as an opportunity to garner feedback on Municipal Clerk's Office services, and on potential barriers to participation.

**Candidate Information Sessions:** The second phase will begin in late 2019, and should be completed by spring 2020. The session will focus on providing candidate information. These engagements will be geared to potential candidates, and will provide information on the election timeline, relevant legislation and forms, and the services that the Election Office provides. For the 2019 candidate sessions, staff will focus on engaging with diverse populations, and in 2020 the customary information sessions will be offered to a general audience.

In advance of the 2016 general election, candidate information sessions were held in the spring and summer providing necessary information around becoming a candidate. Feedback from the African Nova Scotian (ANS) Community Circles yielded that engagement with diverse communities should have occurred the year before. Presenting in the summer did not afford for the necessary time to consider the financial, and personal investment required to commit to running a campaign, which may have resulted in fewer diverse candidates from running for municipal office. For example, the Federation of Canadian Municipalities, Women in Politics (campaign school) session usually occurs in the Fall in the year preceding a municipal election.

To promote HRM's values of diversity and inclusion, a targeted approach will focus on engaging with young adults, ANS communities, Francophones/Acadians, members of the LGBTQ2S community, Indigenous peoples, women, persons with disabilities, and persons from rural communities in the municipality. To reach these communities, the Election Office will explore opportunities by way of community groups, professional networks, and other civic minded organizations. The Election Office will work with the Diversity and Inclusion Office, Corporate Communications and other municipal departments to build a strategy to inform, engage and promote the opportunity to run for political office.

**Take it to the Street:** the final of phase of engagement will commence late spring 2020, through to Fall 2020. The Election Office will have an outward facing presence encouraging residents to apply to work at a voting location, ensure they are on the voters' list and to vote. Commencing in 2020, the Election Office will work with Corporate Communications, and Civic Events, to create an engagement strategy. In this phase, staff will connect with residents where they are. Street teams will be employed and instructed to interact with the public, by distributing election branded promotional materials and providing information on election related services. Building off some of the successes of the 2016 election, staff will work with other departments and partners of the municipality to leverage its reach.

### **FINANCIAL IMPLICATIONS**

The following is a proposed breakdown of the \$15,000 withdrawal from the Municipal Election Reserve, Q511. Where applicable, the Election Office will use existing resources such as existing meeting spaces in City Hall and at the Municipal Records & Archives, training sessions will be lead by the Election Office, rather than hiring outside trainers, to manage costs. SDRO training stipends are derived from the Tariff of Fees, established from the 2016 Election, attendees will receive \$50.00 for each training session.

#### **2018/19 Election Training/Engagement Budget**

<b>Expenditures</b>	<b>18/19 Proposed Budget</b>
* Office Supplies	400
* SDRO Training Stipends	4,500
* Training Documentation	700
* Meeting Logistics	600
* Development of online training materials	800
* Engagement	8,000
<b>** Total</b>	<b>15,000</b>

**Reserve Budget Summary**

March 31/18 balance	\$1,072,300
Less 2019 Training/Engagement Costs	<u>\$15,000</u>
<b>Balance</b>	<b>\$1,057,300</b>

**RISK CONSIDERATION**

There are moderate risks associated with not implementing the recommendations in this report. Legal, service delivery, and reputational risks were considered to reach this conclusion.

**COMMUNITY ENGAGEMENT**

The Election Team had received feedback from election workers members of the public, regarding customer engagement and service in 2016 that support the need for a more comprehensive training program for SDROs and engagement strategy to inform potential candidates. Election Area Coordinators, who oversee SDROs, also provided feedback on the need for knowledgeable and confident SDROs.

**ENVIRONMENTAL IMPLICATIONS**

There are no environmental implications associated with this report.

**ALTERNATIVES**

The Audit & Finance Standing Committee could recommend that Regional Council not approve the withdrawal from the Election Reserve, or approve a withdrawal of a different amount. This is not recommended for the reasons outlined in this report.

The Audit & Finance Standing Committee could recommend that Regional Council not undertake either a training strategy or an engagement strategy. This is not recommended for the reasons outlined in this report.

**ATTACHMENTS**

None.

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A copy of this report can be obtained online at [halifax.ca](http://halifax.ca) or by contacting the Office of the Municipal Clerk at 902.490.4210.

Original Signed

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