



# *Election guidance*

### What is the schedule for 2021 council elections

The schedule for 2021 council elections is as follows:

Action	Date
Qualifying Date	16 October 2020
Issue of Election Notice	(12 Noon GMT) 12 November 2020
Closing date for nominations for elections	(12 Noon GMT) 14 December 2020
Vetting Committee review of nominations	18 December 2020
Announcement of uncontested election results	21 December 2020
Inform contested candidates of ballot	21 December 2020
Issue of voting papers for contested elections	8 February 2021
Closing date for receipt of voting papers	(12 Noon GMT) 26 February 2021
Formal announcement of Council election results	w/c 8 March 2021

Please note all forms and policy guidance can be viewed at [icaew.com/councilelections](https://www.icaew.com/councilelections)

### Am I eligible to participate in the elections

Any member with a registered address in an election constituency as of the **Qualifying Date** is eligible to stand, vote and nominate a candidate in the election. The Qualifying Date for 2021 Council elections is **16 October 2020**. Your election constituency is specified in 'My Details' on your member profile. You are encouraged to check your member profile under 'My Details' before the Qualifying Date. Please also view the Council Role Profile, for expectations and time commitment that go with the role.

### How do I complete my candidate application?

You can complete your application via the online nomination system from **12 November 2020** at [icaew.com/councilelections](https://www.icaew.com/councilelections).

## **[New for 2021] Candidate Vetting Process**

Upon completion of your candidate application, you will become a Provisional Candidate. The ICAEW Nominating Committee will meet after the closure of the Nominations Process and will review each candidacy. For further information, on conflicts of interest, please review the 'Declaration of Interest Policy'.

As members of the Vetting Committee, current office holders will not nominate a candidate in the elections.

The returning officer must not accept any nomination which:

- is incomplete or which is received after the deadline for nominations.
- in the opinion of the Nominating Committee, represents a potential for conflict of interest to the extent that, in managing this conflict, the member maybe unable to fulfil the role of Council member to the standard that would be reasonably expected by the members

## **How do I know if I am approved as a candidate?**

The Chief Executive's Office will check all nominations to ensure candidates belong to the constituency where they wish to contest elections. A disciplinary check will be conducted to ensure there are no adverse findings in the last 10 years that might disqualify the member from joining Council. Once, this check is complete, the candidate's name will appear on the nomination site to members in the constituency. A completed application includes:

- The Candidate Statement and Declarations of Interest Form
- Receipt of your five nominators;
- A clean disciplinary background check;
- Candidacy approval from the Nominating Committee.
- You must also have a registered address in the constituency you are standing in, by the qualifying date

Your candidacy will only be confirmed once all the below have been received and/or completed

## **What should I include in the candidate statement?**

All candidates must submit a candidate statement in the standard template available on the nominations site. An example is provided in appendix 1. You are advised to complete all sections of the template. If you leave a section blank, it will appear as such in your final statement. There is no word limit, but brevity is advised to keep the statement effective and focused.

## **How many nominators do I need?**

All Candidates need **five** nominators. The nominators must be full ICAEW members and their registered address must be in the same constituency as the nominee at the Qualifying Date (16 October 2020). Nominators can register their support via the online nomination system [icaew.com/councilelections](https://www.icaew.com/councilelections). They will need their membership number and password to access the system.

## **When is the deadline for sending my application?**

The completed application should be received by the Chief Executive's Office by **12 noon GMT on 14 December 2020**.

## **What are the rules for campaigning?**

- Candidates may start campaigning only after close of nominations and once they have received written confirmation from ICAEW that they are candidates in a contested election in their constituency.
- Your candidate statement offers a provision to include URL for your LinkedIn profile. You can also campaign through short videos uploaded on compatible sites such as Vimeo or YouTube. Some tips on creating a video are in appendix 2. Candidates are personally responsible for the information they provide and must ensure their videos are compliant with the election regulations and are protected through appropriate security settings.
- The **Chief Executive's Office** is able to provide guidance, but cannot produce or host additional campaign material for candidates. The Returning Officer may refuse to allow any material that is considered unsuitable for use in the campaign. Please familiarise yourselves with the Election Regulations before undertaking any campaigning activity.
- You cannot request for or use a contact list you may have received as part of your current and ongoing engagement with ICAEW to canvass members in your area. You are welcome to approach your personal contacts and colleagues who may be ICAEW members, whilst ensuring you comply with the General Data Protection Regulations (GDPR). If in doubt, please seek advice from the **Chief Executive's Office**.
- Candidates may campaign for support via social media and other communication channels. You can use your personal LinkedIn, Twitter, Facebook or other social media to promote yourself within your constituency. You can also post within ICAEW LinkedIn groups you are a member of. See further guidance (appendix 3). You are encouraged to network and let members know you are standing for Council and your key objectives.
- ICAEW will promote the elections on ICAEW.com, email and social media, and at regional events once the voting opens. Candidates are encouraged to signpost members in their constituencies to these channels to read their candidate statements which are designed to provide more information in support of the candidate.
- Candidates may promote themselves at ICAEW events, as long as they are not doing so as part of delivering a speech in a formal capacity.
- Candidates can directly approach any publications that are not owned or managed by ICAEW as part of campaigning.
- You may approach the ICAEW Regional team to promote your candidature through their newsletters to members. The Regional team will provide a fair and impartial service to all candidates. You can find out more information and who your local contacts are [here](#).
- For member communication plans outside the UK, please contact **Caroline Newton** (Europe and Eurasia) or **Lucy Paget** (for queries outside of Europe and Eurasia).
- Council members act collectively on behalf of their constituents. You are advised to avoid personal manifestos or single issue campaigns. At all times, please ensure your campaign does not flout the election regulations, is in good taste and reflects the ICAEW values and Code of Ethics.

### **When does voting open?**

For constituencies that go to ballot, voting will open at **12 Noon GMT on 08 February 2021**. Members eligible to vote will either receive a voting email or postal ballot.

### **How do members vote?**

You will be able to vote online from **12 Noon GMT on 08 February to 12 Noon GMT on 26 February 2021**. Postal votes must be received by our scrutineers by 12 Noon GMT on 26 February 2021. Ballot papers received after will be considered invalid.

### **When does voting close?**

Time 12pm (noon) GMT 26 February 2021

**How long after voting closes will I know if I have been successful?**

ICAEW will confirm results of the election to candidates by email. Results will also be published on [ICAEW.com/councilelections](https://www.icaew.com/councilelections) seven days after close of voting.

**Appendices:**

Appendix 1: Candidate Statements

Appendix 2: Declaration of Interest form

Appendix 3: Tips for effective video statements

Appendix 4: Hints and tips for effective canvassing

## APPENDIX 1 – TEMPLATE FOR CANDIDATE STATEMENT

To stand as a candidate for Council election, please complete the form below which will be used as your election statement.

There is no limit to the word count. You can leave a question unanswered, but it will appear as blank in the final statement.

### CANDIDATE NAME:

**Personal introduction:**

Please provide information about yourself, including career highlights and experience to date, including any international aspects. You could also include links to any social media presence you might have.

**Your involvement with ICAEW:**

As part of their representative role, Council members are expected to be involved in ICAEW activities at a corporate and local member level. Please outline any past or current involvement with ICAEW, e.g. membership of committees, District Society, International Member Group, student group, etc.

**Motivation and ability to be a member of Council:**

Please outline your reasons for seeking to be elected to Council and how you will meet your obligations by contributing the time needed to be an effective member of Council.

**Strategic focus:**

Council is responsible for setting ICAEW's overall strategy. Please outline your views on the key issues affecting members of your constituency, ICAEW membership and the wider accountancy profession at large. Please also outline how your knowledge, skills and experience could help ICAEW's strategic development.

**Communication with members in your constituency:**

Elected members represent ICAEW members in their constituency. Please outline your intentions and plans for interacting with members in your constituency and addressing issues they face.

## APPENDIX 2: TEMPLATE DECLARATIONS OF INTEREST FORM

# *Declaration of interests which are relevant to the business of ICAEW*

Please record below information about personal, business or other interests (including information relating to members of your immediate family) which might, to the best of your knowledge or belief, or of which you could reasonably be expected to be aware:

- give rise to a conflict of interest for you with the activities of the ICAEW or
- influence or lead to a perception of a conflict in the eyes of the public, the membership or your colleagues in your behaviour as an Committee member or in the way in which you alone, or together with others, participate in or vote on ICAEW affairs.

We will use this information:

- in the case of a candidate applying to stand for election to ICAEW Council, to inform the electorate of the interests declared
- to inform the relevant committee chairs and secretaries of potential conflicts of interest to enable them to take appropriate steps to manage the conflict
- to update the public register of interests, published on [icaew.com](http://icaew.com).

**Please read the ICAEW Policy and Guidance on Declaring Conflicts of Interest before completing this form. You are required to declare matters that are relevant to the business of ICAEW.**

Please use additional sheets if necessary

Membership of, or interests in, formal bodies or groups, including other professional bodies <sup>i</sup> :	
Membership of ICAEW Council, ICAEW Boards and other ICAEW committees:	

Partnerships, Directorships or beneficial interests in companies:	
Professional or social relationships with individuals who have business relationships or who compete with the ICAEW:	
Any other matters you feel should be identified:	

**I declare, to the best of my knowledge or belief, and in relation to my financial and other interests which are relevant, the details listed above represent my interests and that, where I have left a category blank, I have no interests in that category.**

**I understand that this information may be made public.<sup>ii</sup>**

**As a member of the boards and committees of ICAEW, I confirm that I will carry out these roles to the best of my abilities and I will act with independence, with integrity, and in the best interests and Charter obligations of ICAEW.**

Named (Printed)

ICAEW Membership  
number (if applicable)

Signature

Date

## Indirect interests

If your declaration includes indirect interests arising from your connection with an individual such as an immediate family member, it is important that those individuals are aware that you are disclosing this personal information to ICAEW and how we will use this data.

We will, as far as practicable, seek to anonymise information published on the public register of interests on [icaew.com](http://icaew.com).

Each individual affected by this declaration of interests is required to give their consent to ICAEW processing and using the data as set out in this document.

### **I give my consent to ICAEW holding and processing the data provided above as it relates to me**

Named (Printed)

Relationship with the  
above  
Signature

Date

Once completed, please return your signed and dated declaration to:

Head of Chief Executives Office  
ICAEW  
Chartered Accountants' Hall  
Moorgate Place  
London EC2R 6EA  
UK

E: [chiefexecutivesoffice@icaew.com](mailto:chiefexecutivesoffice@icaew.com)

T: +44(0) 207 920 8584

This includes employment by a professional body.

<sup>1</sup> Your declaration of interests may be made public on [icaew.com](http://icaew.com) for members of ICAEW Council and ICAEW Board.

If you are completing this declaration as part of your application to stand for election to ICAEW Council, your declaration may be made public as part of the election ballot.

If you, or any of the other individuals affected by this declaration have any concerns about the publication of your declaration, please contact [chiefexecutivesoffice@icaew.com](mailto:chiefexecutivesoffice@icaew.com) or call the Head of Chief Executives Office on 0207 920 8584 before returning your declaration.



## APPENDIX 3 – TIPS TO PRODUCING VIDEOS

### Practical Information

- **Time:** Be aware of the time it takes to make a good video. For a good 1-2 minutes video consider at least 2 hours for preparation to make the shooting as effective as possible.
- **Structure:** Know what you want to say in advance and have an outline script with an easy to follow structure ready for use.
- **Lighting:** Make sure you have enough light, even offices can come across as very sombre especially when not using a professional camera. Try to avoid too much backlighting: film in front of a light-coloured neutral background
- **Camera:** There are many good professional video suppliers that can provide you with high quality footage, but you will be surprised by the quality of well-made amateur videos filmed with smart phones. Start by using a tripod and avoid zooming, this will ensure the image is stable and in focus. Film in landscape, filling the frame with the subject.
- **Sound:** Make sure that there is no background noise and that you speak clearly into the camera microphone if you don't have an external microphone. Note you will have to speak and shoot at the same time so think about pacing your words.
- **Toggle your camera:** Put yourself in the video by switching between the front and rear-facing cameras.

### What to say

- **Short and Sweet:** Be concise. Especially when producing a video aimed at triggering action (in this case a vote), make sure you stick to three main messages. You can be sure they will be remembered! For example, you could consider focusing on the following:
  - Why does being represented at ICAEW matter?
  - This is what I stand for
  - This is why you should vote for me.Keep your statement short – no more than 90 seconds.

### How to say it

- **Establish trust:** Trust and credibility come from being perceived as caring and empathetic, committed, and dedicated, honest and open. Talk directly to the camera – imagine you are talking to a real person.
- **Simplicity and structure:** Deliver your main message first, get straight to the point and explain even the most technical piece of information as simply as possible.
- **Be a great presenter for the day.** Work on a few presentation skills to help you come across as approachable and trustworthy as possible. Key elements to consider when presenting:
  - Keep a lively tone, play with your voice, and pause occasionally.
  - Throw in some humor and a personal element. It helps the audience relate to you.
  - Use your hands and use 'natural' movements, but don't overdo it
  - Try to keep a relaxed yet appropriate posture

### Editing

- There is a strong case for finalizing your video with editing tools if you have access to these facilities. Together with enhancing the sound and vision, editing your video could allow for the addition of some visual elements to your video, spelling out your main points.

## APPENDIX 4 – HINTS AND TIPS FOR EFFECTIVE CAMPAIGNING

### Using social media

- Social media (networks such as LinkedIn, Twitter, Facebook etc) can support traditional methods of canvassing. Use **#icaewCouncilElections** in your social media promotion across Twitter, Facebook and LinkedIn to maximise reach among members engaging with this conversation.
- Use your social media posts to reflect key points from your candidate statement
- **LinkedIn** is a great platform for professional promotion. It has the potential to reach a vast number of contacts who may or may not know you personally. You can also insert your LinkedIn profile URL in your candidate statement. Other ways to maximise reach is to post updates to your profile. Members in your constituency who are your 'connections' on LinkedIn will receive notifications of new posts, and they in turn can share these with their connections who may also be members in the same constituency.
- Using **Twitter** effectively requires time and skill. It also takes time to establish a network. For the purposes of an election campaign therefore, it might only work if you already have an account and network of followers relevant to the election.
- **Facebook or Instagram** allows you to reach out to members in your constituency who may also be personal contacts and friends. The informality of the channel allows you to promote your candidacy in a way that might be appealing to friends and colleagues.
- Sites such as **Vimeo** allow individuals to upload short videos. These can be password protected so that only individuals who have been invited to view these videos may access them. A URL to your video can be inserted in your candidate statement along with the password so that all members of your constituency can view this.
- Every channel has its own unique style. When writing for social media, it is important to be clear, concise and consistent in the message across different channels.

### Using email

- Personal emails to your personal contacts can help support your campaign. It is important that your message is joined-up across your campaign.
- When drafting an email:
  - Make references to key points in your candidate statement
  - Include a clear call for action: Vote for me!
  - Brevity is key. You are more likely to get your reader's attention if you can communicate in a concise manner.
  - Personalisation is important – the more tailored the message is to the individual reader, the more engaged the reader will be with the content
  - Subject line: Think about the device the reader will be viewing your email on: Mobile phone, tablet, desktop. Subject lines should be an appropriate length for all of them.
  - Easy to follow layout: Make sure you break up lengthy paragraphs, keep sentences short and use headers where appropriate.
- Mass mailings, especially to people you do not know or based on data acquired from a third party should be avoided as it is likely to breach General Data Protection Regulations. If in need of clarification, please contact [chiefexecutivesoffice@icaew.com](mailto:chiefexecutivesoffice@icaew.com) for advice.