



Municipal Election Preparedness: Planning, People & Process

AMCTO Zone 5 Fall Meeting

October 17, 2025

About Us

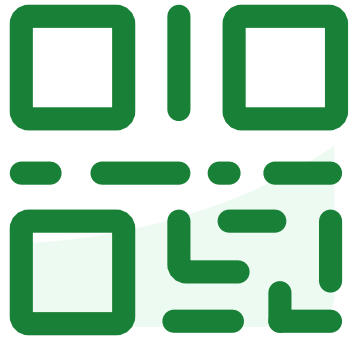
➤ Training

- Election Candidate Training (*new 2026*)
- Council Orientation Training (*new 2026*)

➤ Coaching/Mentoring

➤ Policy/By-law and Special Projects





**Join at slido.com
#8124583**



What is the #1 fear that Clerks have in conducting elections?

What we will cover

- Importance of Early Planning
- Resource Management
- Timeline and Workflow Planning
- Training and Capacity Building



2025

State Of The Clerk's Office Report

Presented by eScribe and IIMC



- Clerks are highly experienced (more than half have been in their roles for more than 10 yrs)
- Need for strong mentorship and knowledge transfer to prepare new Clerks
- Need to modernize processes and leverage technology to support Clerks

The Importance of Early Planning

**Monday,
October 26,
2026**

- Ensures better budgeting
- Allows time for system testing and procurement
- Allows for proper staff recruitment and training
- Avoids last-minute decisions which can lead to errors or missed opportunities
- Reduces stress & burnout

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Election Resource Management

Managing Human Resources

Coordinate Election Personnel Recruitment:

- Determine positions needed – depends on form of voting
- Consider using temporary and internal staff
- Recruit early with outreach and advertising process
- Utilize written testing and interviews
- Appoint standby staff

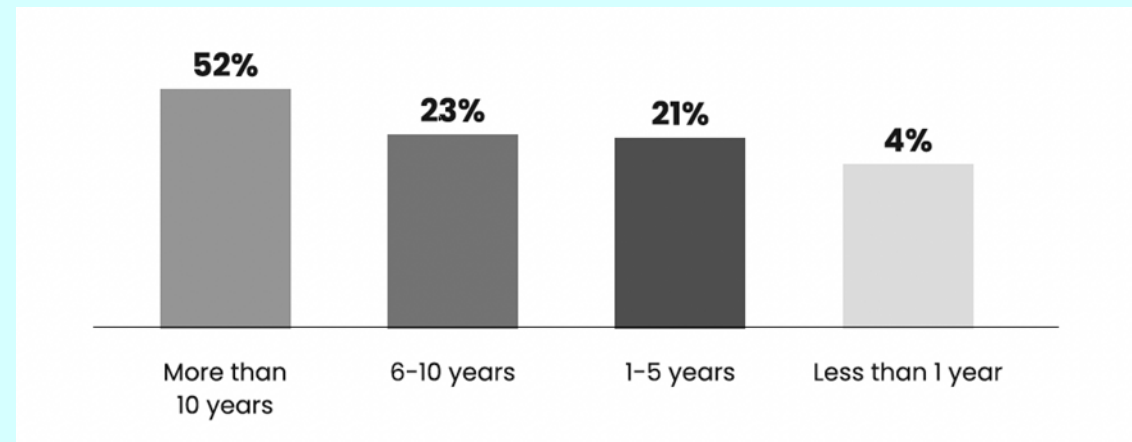
Build Your Election Team Early

- Involve internal departments: IT, Facilities, Comms
- Engage past vendors early to leverage their experience and maintain continuity
- Consider other consultants to help with special projects

Succession Planning & Mentorship

- 67% of clerks have worked in the same municipality throughout their careers.
- Very few clerks (only 4%) have less than 1 year of experience, indicating a potential succession planning gap.
- Regional collaboration and mentorship networks are key strategies for knowledge transfer.

"There is a wealth of expertise to be shared; don't miss out on opportunities to learn something new from colleagues in different areas!"



Managing Material Resources

- Finalize the voting method that you will use in 2026
- Prepare an accurate inventory of supplies and equipment that you have on hand (e.g., ballot boxes, privacy screens, signage).
- Map out and review what you used in 2022 and evaluate where adjustments are needed.
- Start identifying equipment needs now.
- Secure accessible voting locations and equipment
- Consider contingency needs to prepare for any unforeseen circumstances

Build a Realistic Budget

- Start your budget planning now
- Account for inflation
- Consider staffing, training, supplies, equipment, communication and outreach, and accessibility compliance
- Establish a reserve fund for contingencies

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Timeline and Workflow Planning

Create a Master Timeline

- Having a clear roadmap ensures everyone knows what's expected.
- Utilize the AMCTO Municipal Elections Calendar which aligns with MEA deadlines
- Include internal milestones

Explore Automation and Modernization

- Evaluate tools that reduce workload or error risk:
 - Online recruitment or training platforms
 - Tabulators or vote-counting software
 - Voter list management systems
 - Real-time Issue tracking tools
- Online, telephone and vote by mail elections may require significant automation



What tools or technology are you considering for the upcoming election?

Develop Effective Procedures

- Prepare detailed election procedures
- Contemplate and plan for the unexpected
- Build in contingencies
- Walk through every aspect of your procedures.

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Training and Capacity Building

Invest in Training for Staff and Workers

- Training should be meaningful and consistent
- Technical training + customer service
- Be sure to include accessible customer service training
- Accessibility awareness and training
- Combination of hybrid training (online and hands-on)
- Mock setups & scenario-based practice

Cross-Training and Delegation

- Cross train key staff to provide backup when necessary
- Cross train in:
 - results certification
 - managing public inquiries
 - dealing with candidates
 - crisis response
- Delegate/share responsibilities

Training a New Council

- **Election Candidate Training** - prepares them for prospective new role
- **New Council Orientation** – establishes a strong foundation for success
- **Regular Council Training** – continuous training throughout the term reinforces and builds on initial training

Points to remember....

- ✓ Be consistent and remain neutral at all times
- ✓ What you do for one....do for all

Capacity Building

- As Clerk, you can't be everywhere
- Managing a municipal election alongside your regular duties can be challenging
- Building capacity within your team ensures smooth operations and maintains continuity
- Look to others for help especially during busy election periods

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Key Takeaways

Key Takeaways

- Start planning in 2025
- Engage your team early
- Budget smartly and proactively
- Invest in tools and training

Let's Talk...

- Are you anticipating other challenges?
- What worked well in 2022?
- Lessons learned in previous elections?

“By failing to prepare, you are preparing to fail.” – *Benjamin Franklin*

Contact us...



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Clerks *on Call*



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