The following checklists are to support Returning Officers in carrying out their role. They are all for optional use and do not form part of, or replace, the rules. All Returning Officers should make sure they consult the selection rules at each stage, and should make sure that members of the Shortlisting Committee do so too.

**Overall Checklist FULL PROCESS**

This list gives key elements of the rules for the key participants:

|  |  |
| --- | --- |
| **Before Advertising** |  |
| **Local Party Executive:**   * Provides the Shortlisting Committee (via the RO) with details of the priorities for the campaign and expectations of the candidates’ role in achieving these. * Submit details of the proposed Shortlisting Committee to the RO * Supplies contact details of the membership data officer to the RO. * Prepare the outlines of their candidate compact. |  |
| **Returning Officer:**   * Approves the final membership of the Shortlisting Committee put forward by the Local Party Exec. * Checks with Candidates’ Office that the correct number of people on the Shortlisting Committee are trained and organised or carried out training if an insufficient number are trained. * Informs both the Candidates’ Office and Membership Services of intended date of advert. * Advises and assists the Shortlisting Committee in carrying out their tasks as detailed below. |  |
| **Shortlisting committee:**   * Agrees the selection criteria (including agreeing minimum standards which applicants must meet if they are to be interviewed or shortlisted). * Agrees the application form. * Draws up an information pack about the constituency. * Draws up a draft timetable in conjunction with the RO. * Agrees the expenses cap * Agrees the wording for advertisements (members’ website) and whether they wish to advertise more widely. * Agrees whether to authorise someone to phone approved candidates. * Provisionally decides the interviewing process, how applicants will be assessed at interview and what marking scheme will be used. * Agrees the maximum number of bulk emails to members. * Contact the Party Organisations listed in Rule 8 |  |

**After advertising**

**Returning Officer:**

* Acknowledges enquiries and sends application packs.
* Receives completed applications and collates them in a form in which they can be transmitted to the Shortlisting Committee.
* Checks with Candidates’ Office applicants’ approval status
* Obtains 2 lists of those eligible to vote from Membership Services.
* Checks individuals’ membership status with the local party Data Officer as necessary.
* Keeps all applicants informed of the progress of selection process.

**After the close of applications**

**Returning Officer:**

* Passes all applications to the Shortlisting Committee.
* Provides the Shortlisting Committee with sheets reflecting the agreed marking scheme for ascertaining whether candidates meet the minimum selection criteria.
* Satisfies themselves that the decisions of the Shortlisting Committee have been arrived at robustly, fairly and based on evidence in the applications.
* Checks that the minimum criteria for the make-up of the shortlist have been met and take the appropriate action if they have not.

**If short-listing interviews are held:**

* Informs all applicants of the arrangements for the short-listing interviews including details of how they will be assessed and marked.
* Provides the selection committee with sheets reflecting the agreed marking scheme for collecting evidence from the interviews and recording applicants’ scores.
* Agrees venue(s), chair and other arrangements for members’ meetings.
* Receive marking sheets from Shortlisting Committee members and analyses the final scores

**In every selection:**

* Notifies all applicants of the outcome of their application and the name of the Shortlisting Committee member who will give feedback if requested.
* Notifies the Regional Candidates’ Chair and Candidates’ Office of the outcome of the shortlisting process.

**The Shortlisting Committee:**

* Receives the applications from the Returning Officer.
* Sifts applications and rejects any that do not meet the minimum selection criteria.
* Satisfy the Returning Officer that all decisions taken by the Shortlisting Committee have been arrived at fairly, robustly and on the basis of evidence in the applications.

**If short-listing interviews are held:**

* Agrees questions, tasks, dates, venues and marking schemes with the Returning Officer.
* Conducts short-listing interviews, submitting individual mark-sheets to RO.
* After the short-list is agreed, discusses individuals’ performance with other committee members so that one member can give feedback to applicants if requested.
* In contested selections face to face feedback, with a written version of feedback handed over, is desireable.

**All**

* Await the cut-off date for appeals before announcing the short-list.
* Arrange for enhanced checks where required.

**After the announcement of the shortlist**

**Returning Officer:**

* Collects data protection disclaimers from short-listed applicants and provides them with membership lists.
* Releases details of the shortlist to the local party.
* Prepares ballot papers.
* Agrees the content of the mailing to members.
* Invites candidates to provide their personal manifesto for inclusion in this mailing by an agreed deadline.
* Ensures that all candidates have access to a copy of the selection rules.
* If any complaints or queries are received about the conduct of the campaign, makes a ruling on these, informing candidates, Shortlisting Committee members, the Regional Candidates’ Chair and the Candidates’ Office.
* In contested selections the RO e-mails the campaign rules (agreed with the shortlisting committee) to candidates who must reply stating they have read and accept the rules before they are sent any membership data.

**The Shortlisting Committee, with the local party:**

Confirm the rules of the campaign about leaflets, letters, email and social media

* Informs the RO of any events that will take place in the constituency after the shortlist is announced and before the members’ meeting as such events are agreed.
* Prints and posts/emails the mailing to: all members eligible to vote, each short-listed applicant, the RO, at least 14 days before the date of the first members’ meeting.

**After the mailing, during the selection campaign and at the members’ meeting.**

**The Returning Officer:**

* Issues and receives postal ballot papers.
* Makes a ruling regarding any complaints or queries that are received about the conduct of the campaign informing candidates and Shortlisting Committee members.
* Agrees the format of members’ meetings with the Shortlisting Committee.
* Informs the candidates of the rules for the members meeting.
* Appoints aides for the members’ meetings, if wanted.
* Ensures that only eligible members are issued with ballot papers.
* Ensures members can vote at any time during the meeting.
* Conducts the count at the end of the final members’ meeting.
* Makes sure that the ballot is valid and when voting is finished asks all candidates if they have any complaints before opening the ballot box.
* After the count, check there are no complaints from the candidates and ask them to sign the acceptance of result form before announcing the result to the meeting.
* Informs the RCC and Candidates’ Office of the result of the selection, ensuring that supporting paperwork is forwarded to the Candidates’ Office without delay.

**The Local Party Executive:**

* Informs the local media that a candidate has been selected using current guidance on the format of the announcement.
* Pays the Returning Officer's expenses promptly.