



Process Guide 2: Managing Selections for Returning Officers

Important: This is a standalone guide intended to help Returning Officers in Parliamentary selections use our online tools. For guidance on running regular candidate selections, please see guide 15.

Lighthouse contains a number of really useful features to make managing a selection much easier.

These features are experimental and will likely need some refinement - but we're hoping that we can work on that with you, to get these tools to a place where they make the process of running a selection much easier, makes it easier for regional and state parties to understand what's going on and reduces our reliance on staff time to run selections.

So - if something is hard to do, could be improved or doesn't quite work right - tell us!

We work hand in hand with the team at Prater Raines and we're really happy to make changes to make this work better.

This Guide is in two parts. You have a "Required" and "Optional" path. The Required path does the bare minimum to set up a selection process, generate a selection list and notify HQ of the candidate.

The Optional path allows you to record a lot more, including applicants, selection committees and their training.

If you find these processes useful, we think that it will be possible to expand them to make the collection of demographic information and application forms easier, as well as looking to automate things like candidate adverts and to reduce what you have to input into the system - but if ROs aren't finding the tools useful, we won't do that work, so please do give us your unvarnished, honest feedback on what works and what doesn't.

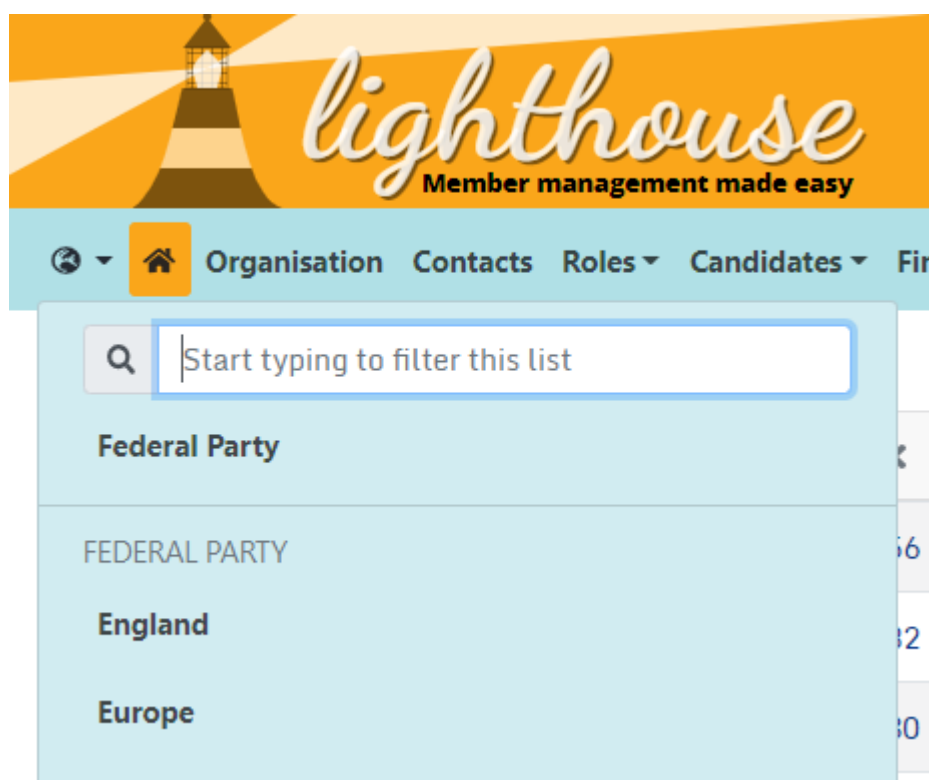
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Quick guide to Lighthouse

When you login to Lighthouse you may well have access to more than one "Organisation". Organisations are party groups, like your local party or your regional party.

To manage selections you will need to be logged into your Region. When you log in, in the top left of the screen it'll say which organisation you're logged into.

If this isn't your region, you can switch by clicking the globe icon, searching for it and then clicking on the correct name.



As a Returning Officer you should have access to the following areas of Lighthouse:

- **Dashboard** - which contains top-level stats on the areas you have access to.
- **Contacts** - you should be able to view and edit contacts and this is where you'll find members (there are also supporters, donors and non-members available)
- **Roles** - you should be able to view roles, so you can see who's who in the local party, as well as view Approved Candidates.
- **Candidates** - you should have full access to this selection. This is where selections are actually run.

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- **Training** - you should have view access to training, so you can look up if a selection committee member has received training on how to be on a selection committee in the last 5 years.
- **Users** - you should have view only access to users so you can find out who has local Lighthouse access and who your Regional Super Users are, just in case you can't reach them.
- **Reports** - you should be able to view, edit and create these. They are like saved searches in Connect and you'll be able to find most of the ones you'll need pre-setup.
- **Tasks** - this gives you access to problem reports, to raise issues with HQ and actions, in case you want to use these to manage tasks local parties need to do.
- **Help** - gives you access to all of the Lighthouse help documentation.
- **Your name** - gives you access to your own data and allows you to set up 2-factor authentication, which helps keep the party's data safe and secure.

You can learn more about Lighthouse and how it works here:

<https://lighthouse.libdems.org.uk>

Required steps

Setting up a Selection

To set up a selection, generate a selection list and post the advert a Returning Officer only needs to complete this form: <https://digitallibdems.typeform.com/to/h3bs1bwp>

To complete the form, you will need to know:

- Your name and public contact details
- Your Returning Officer Role Reference
 - This can be found on Lighthouse under Roles → Other. It's the value in the Reference column, next to your Returning Officer Role.
 - You can also obtain this by emailing candidates@libdems.org.uk
- The Constituency and Lead Local Party for the Selection Process
 - If a constituency is across more than one local party, the system can't cope with that - so one must be designated as the "lead" though this has no practical impact other than making the data work.
- The advert open and close date
- The voting open and close date (this can be changed later)
- The Constituency Contact and their public contact details
- The Constituency Profile in a PDF format

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- To know if the local party reserving a space for a disabled candidate? This question is required.

Once you have successfully submitted the form, you'll receive an email confirming that it has been received to the email you input on the form.

Once everything has been set up you'll get a second email with details on what you need to do next, as well as confirmation of the location of the advert and selection list.

That second email can take up to 24 hours to generate. If you don't get this second email, then you need to email candidates@libdems.org.uk

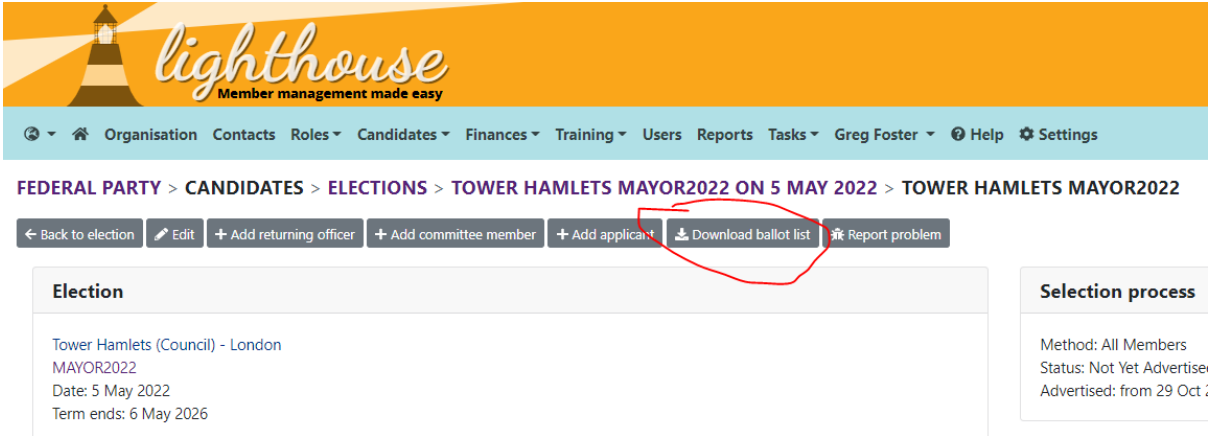
Downloading a Selection List

Once you've set up a selection, that will sit there until the date you've selected for the Membership list.

At midnight on that day (give or take an hour), that fixed list will be generated.

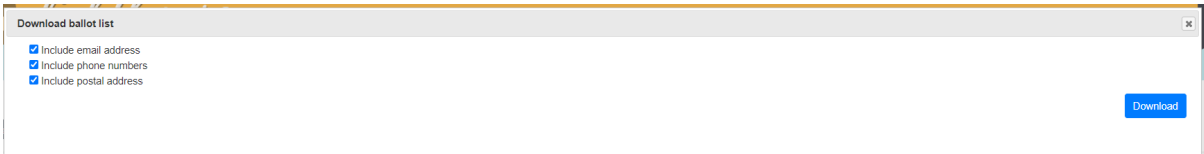
All you need to do is open up the selection process you created earlier (following the same steps as in the last one, but once you're in the Election Record, you can select the Selection Process at the bottom of the screen).

You'll then see a new action button in this selection:



The screenshot shows the Lighthouse web interface. At the top, there is a navigation bar with the Lighthouse logo and the tagline "Member management made easy". Below the navigation bar, there is a breadcrumb trail: "FEDERAL PARTY > CANDIDATES > ELECTIONS > TOWER HAMLETS MAYOR2022 ON 5 MAY 2022 > TOWER HAMLETS MAYOR2022". Below the breadcrumb trail, there is a row of action buttons: "Back to election", "Edit", "+ Add returning officer", "+ Add committee member", "+ Add applicant", "Download ballot list", and "Report problem". The "Download ballot list" button is circled in red. Below the action buttons, there is a section titled "Election" with the following details: "Tower Hamlets (Council) - London", "MAYOR2022", "Date: 5 May 2022", and "Term ends: 6 May 2026". To the right of the "Election" section, there is a section titled "Selection process" with the following details: "Method: All Members", "Status: Not Yet Advertised", and "Advertised: from 29 Oct".

Click download ballot list and select what information you want to include here:



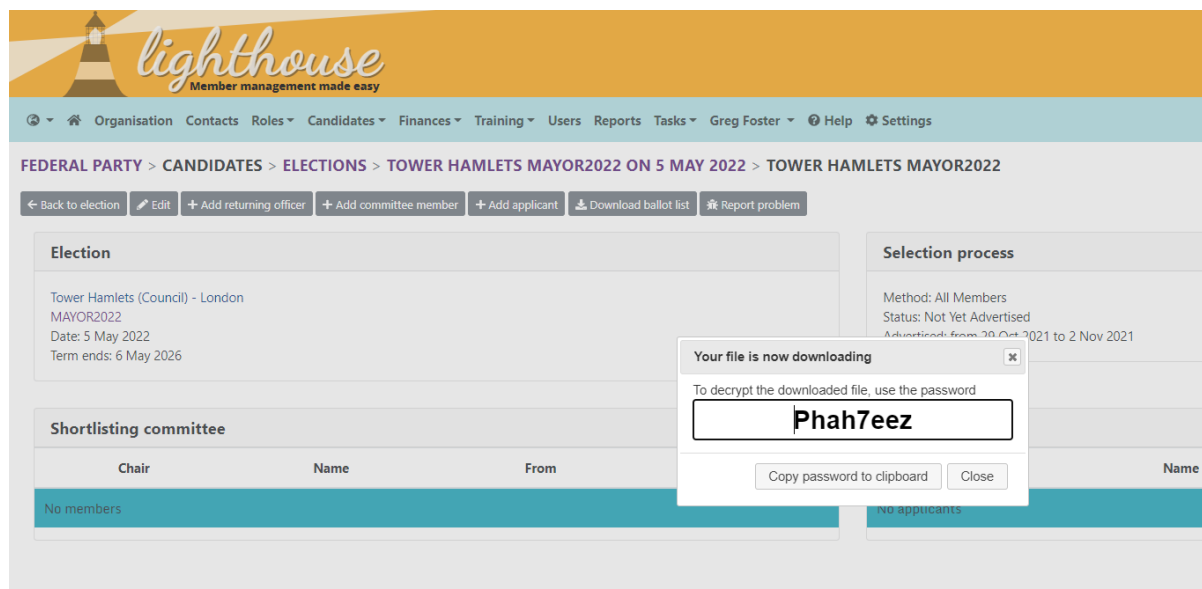
The screenshot shows the "Download ballot list" dialog box. It has a title bar that says "Download ballot list". Below the title bar, there are three checkboxes, all of which are checked: "Include email address", "Include phone numbers", and "Include postal address". At the bottom right of the dialog box, there is a blue "Download" button.

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And click download. This will start a download to your computer of a password protected zip file.

The password for that file will be displayed on screen.



IMPORTANT: Once you close that screen, you can't get the password back, so if you lose it, you'll need to download the file again.

The file itself is fixed at the point it's generated, so it should remain the same no matter how many times you download it.

If you're sharing the file with others, you can obviously just share the zip file and password (by a different communication method) with them. This will help keep party data secure, reduce your workload and mean you can focus on running an election!

NOTE: The auto-generated list as standard generates a list of members in the constituency at the date you specified as the cut-off date. If you require a more complex list, you will need to contact HQ by emailing membership@libdems.org.uk

Inputting a selected candidate

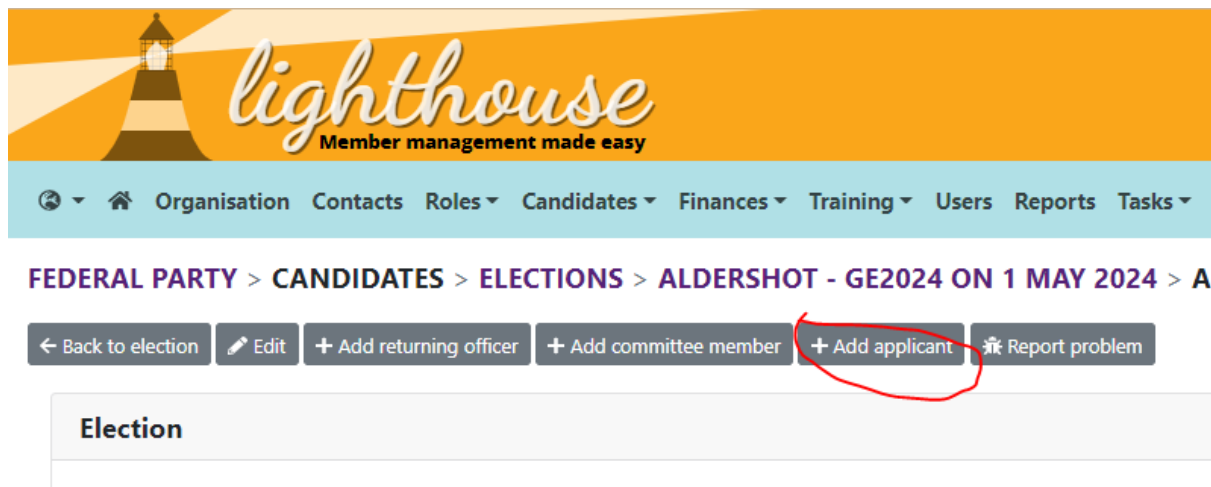
Once your selection has been completed, you can then notify HQ of who was selected by inputting the successful candidate.

In the optional section of this guide, there's a more detailed set of instructions on how to input all the candidates who applied and progress them through the process - if you want to do that, but you only have to input the selected candidate.

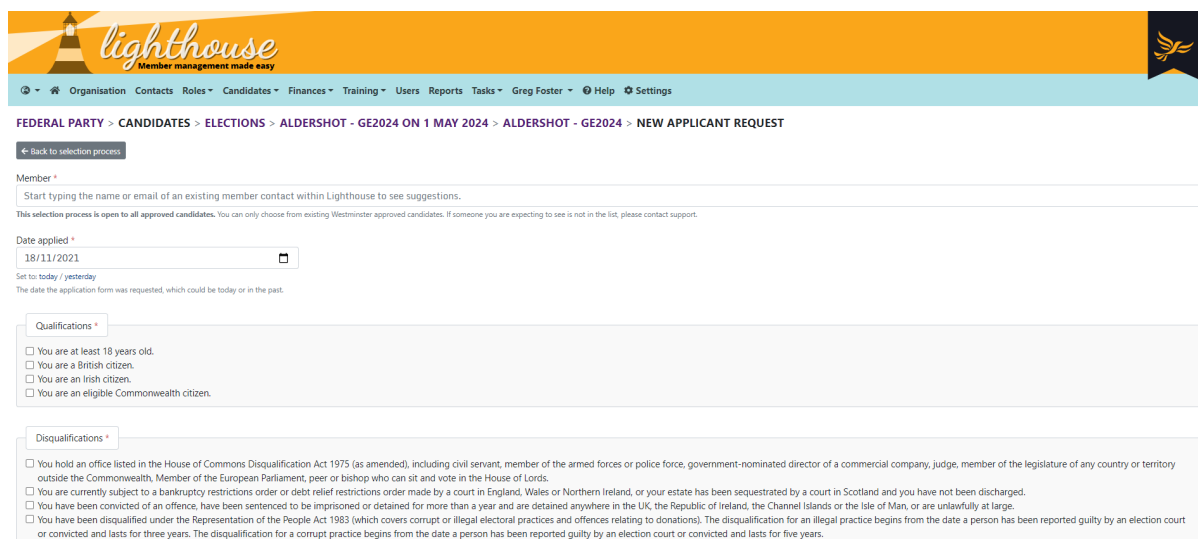
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Navigate to the selection process, using the steps outlined earlier and when you're there, hit the "add applicant" button.



That will then give you the following screen:



In this screen, you can search for members. Only Approved Candidates who meet the criteria you set out when setting up the selection will appear in this search box.

You then need to enter the date that they applied and their qualifying or disqualifying characteristics to stand for Parliament.

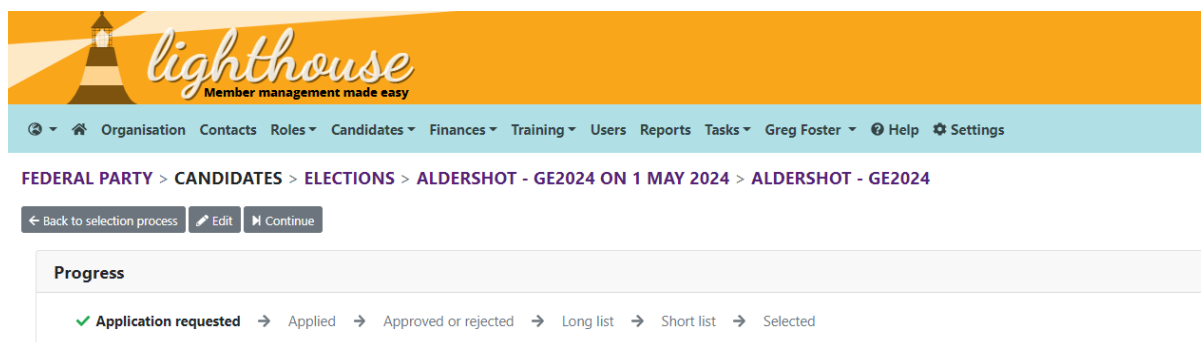
Important: you won't be able to progress a candidate if they have any disqualifying characteristics entered.

You also have a comments box at every stage of this process, allowing you to input notes if you wish to.

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When you're done, click either "Save" or "Save and add another". Save will save the input and take you to the applicant record. Save and add another will save the input and then re-open this screen. This allows you to enter multiple candidates more quickly.



To complete their application and mark them as selected, you just need to hit the continue action button and then continue on each screen, until there's a green tick against selected. This should only take a few clicks and you don't need to enter any more information.

Once this is done, Lauren in the Candidates Office will be notified and the Leader and President's Offices will also be notified, so they can write to the candidate congratulating them on their selection.

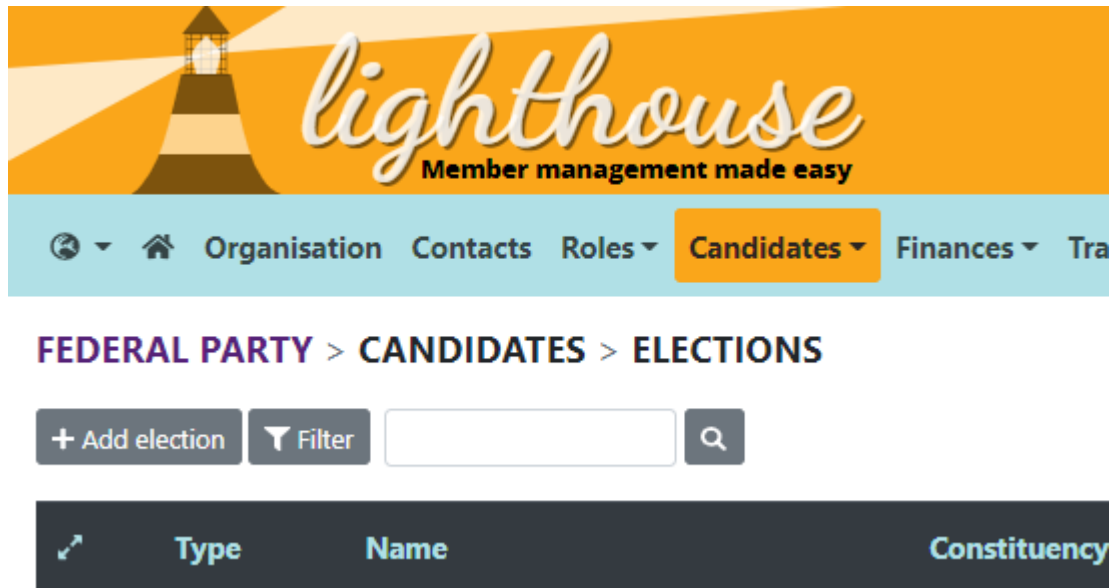
Setting up an election (by-elections only)

You usually won't need to do this, as HQ should sort this for you - but on the off chance you're quicker off the mark, here's what you need to do.

Go to Candidates → Elections and click on the "Add Election" button

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Once you're there, a screen like the below will appear.

The screenshot shows the 'NEW' election form in the Lighthouse software. The breadcrumb trail is 'FEDERAL PARTY > CANDIDATES > ELECTIONS > NEW'. There is a 'Back to list' button. The form has several fields: 'Type' (a dropdown menu currently set to 'Scheduled'), 'Election date' (a date picker field set to 'dd/mm/yyyy'), 'Constituency or electoral area' (a text input field with a search suggestion prompt), 'Name' (a text input field), and 'Number of vacancies' (a text input field set to '1'). There are also some small text instructions and a 'Set to: today / yesterday' option for the date field.

You need to change the type to "by-election" and set the election date. If that's not been set, simply input the most likely date - we can change it later.

You then search for the constituency where the by-election is taking place. The election name will then be automatically generated and you shouldn't need to change the number of vacancies.

There are some additional dates on this page that you can enter if you know them, but this is optional.

Once you're happy, hit save!

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Optional steps

Selection Committees

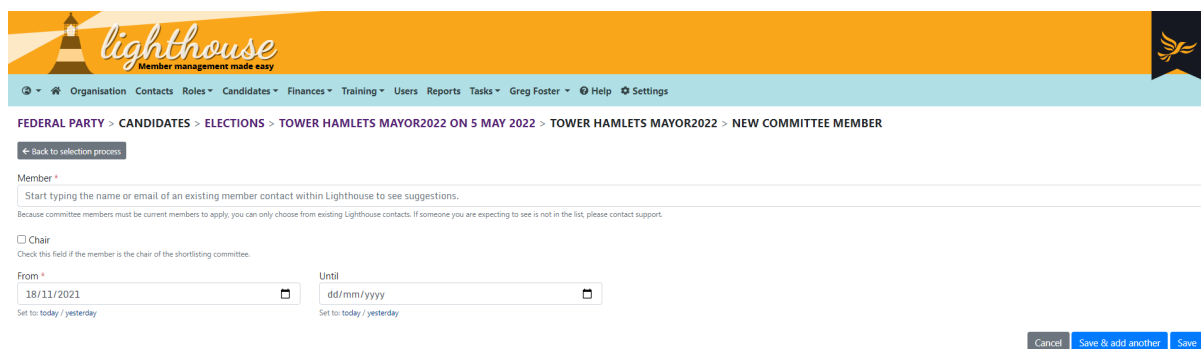
Lighthouse also contains the ability to input who is on your selection committee and that they've been trained to do so.

HQ and the State parties would dearly love to be able to report on the demographics of our selection committees, so if you're able to do this, it would be a huge help.

That said, this step is OPTIONAL and it's up to you if you want to complete it.

To do this, you enter into the selection process record you created earlier and click the "+ Add committee member" button.

That will bring you to this screen:



The screenshot shows the Lighthouse web application interface. At the top, there is a navigation menu with items like Organisation, Contacts, Roles, Candidates, Finances, Training, Users, Reports, Tasks, Greg Foster, Help, and Settings. Below the navigation, the breadcrumb trail reads: FEDERAL PARTY > CANDIDATES > ELECTIONS > TOWER HAMLETS MAYOR2022 ON 5 MAY 2022 > TOWER HAMLETS MAYOR2022 > NEW COMMITTEE MEMBER. A "Back to selection process" link is visible. The main form area has a "Member" label and a text input field with a search icon. Below the input field, there is a checkbox for "Chair" and two date pickers labeled "From" and "Until". The "From" date is set to 18/11/2021. At the bottom right of the form, there are three buttons: "Cancel", "Save & add another", and "Save".

You just search for the member you want to add. It'll search all active members across the entire UK so you should find the person you're looking for.

You then need to enter a start and end date - the start date will default to today and the end date should be when you expect a candidate will be selected.

You can also indicate if this person is the Chair by ticking the Chair tickbox.

When you're happy, you can click Save, which will save and return you to the selection committee page or save and add another, which will let you create another committee member.

More info: *In the backend, HQ will record the fact that these members have been trained to sit on a selection committee and that will give them an accreditation valid for the next five years.*

You can then look up those accreditations in the training section of Lighthouse.

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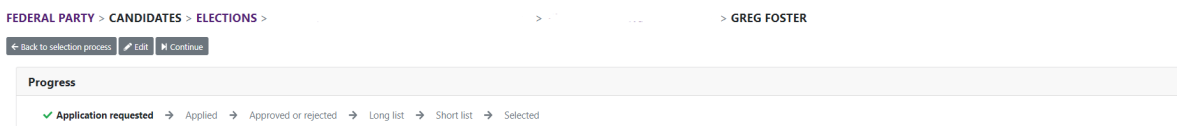
Tracking applicants and applications

If you like, you can use the tool we showed you earlier to manage candidates applications and the associated documents online.

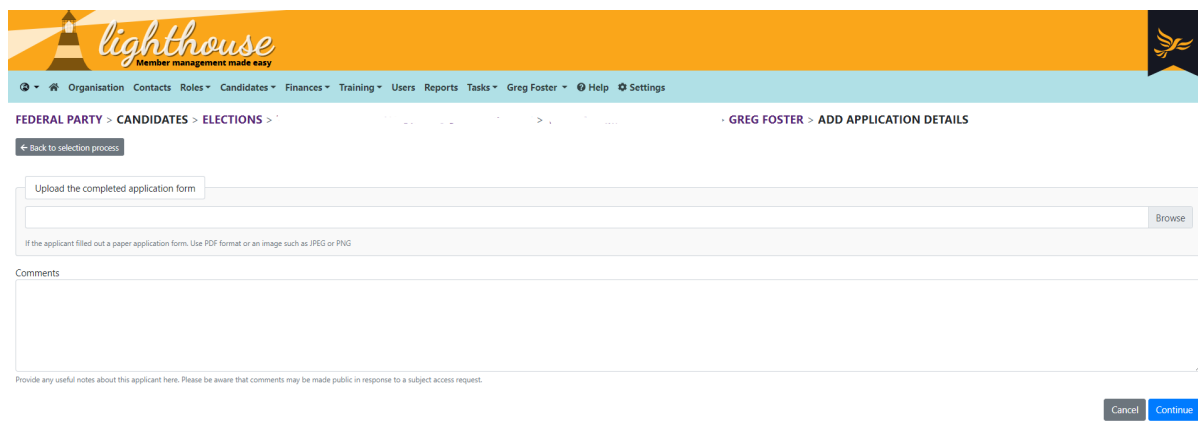
If this is something that ROs find useful, we are really happy to explore adding online forms to this to remove some data entry and allow people to apply securely.

To input an applicant, follow the first steps in the Inputting a Selected Candidate step above, but when you get to the applicant screen, we're going to take each stage in the process separately.

At the first stage, you need to progress an applicant from having requested an application to them having submitted an application - so we're going to click "continue"



You'll then get this screen:



This allows you to upload a completed application form and store it securely on the system.

If you'd set up an application form (more information on that in the next step) you can also input values into the form fields here.

You've also got the ability to add comments about the application, which you can use to make notes about the process - but do bear in mind that these might be obtained if an applicant puts in a Subject Access Request for their data.

You'll see the progress bar update to show where the candidate is:

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Progress

✓ Application requested → ✓ Applied → Approved or rejected → Long list → Short list → Selected

Next, we've sifted our applications and we've decided who has been approved and rejected. You can then update their record to show that. To do that, click continue.

← back to selection process

Approve or reject this applicant *

Approve

Comments

Provide any useful notes about this applicant here. Please be aware that comments may be made public in response to a subject access request.

Cancel Continue

You just need to select approved or rejected and then again, you can add comments here.

Note: If useful, we may look at setting up automatic notification emails to applicants from the RO updating then when you input this information - again if that would be useful. This is likely something we'd include as an option at this stage so you could choose if that email was sent or not.

Again, you'll see that our progress bar has advanced again.

Progress

✓ Application requested → ✓ Applied → ✓ Approved → Long list → Short list → Selected

You can now input the results of the longlisting. Again - click continue here for the next stage.

This stage is simple. All you're doing here is adding someone to the longlist. You can add comments, but no other input is required.

Once you've longlisted the candidates, you're able to move them onto shortlisting. Hit continue for the next screen.

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← Back to selection process

Upload the completed interview checklist

Use PDF format or an image such as JPEG or PNG

Comments

Provide any useful notes about this applicant here. Please be aware that comments may be made public in response to a subject access request.

Cancel Continue

At this stage, you're able to upload completed interview matrixes for safekeeping.

And again, our progress bar will have updated.

Progress

✓ Application requested → ✓ Applied → ✓ Approved → ✓ Long list → ✓ Short list → Selected

The final stage is marking someone as selected - which you do by clicking continue on a candidate who was shortlisted.

Easy peasy!

Note: You can skip any of the stages if they're not necessary. No fields in this process are marked as required, allowing you to be quite flexible in what's part of your process.

If an applicant is unsuccessful at any stage other than the application, all you need to do to not progress their application any further is not update it. Otherwise, applicant records will be left in the state you left them at.

Application forms

The final feature you may wish to use are application forms. These allow you to input paper forms into an online version for safekeeping.

As mentioned before, we are interested in digitising these so candidates can complete them themselves, without you needing to enter them - which would hopefully reduce your workload and give HQ and States a lot more information on who is applying for seats.

To set up an application form, head to candidates → forms

Once you're here, click "+ Add New"

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FEDERAL PARTY > CANDIDATES > FORMS > NEW

← Back to list

Name *

Questions +

+ Add another

Share this form with all descendant organisations

For example, the local parties in your region. If left unticked, only Federal Party admins will be able to assign this form to selection processes.

Cancel

Save & add another

Save

You need to give your form a name, but once that's done you can just start adding questions.

FEDERAL PARTY > CANDIDATES > FORMS > NEW

← Back to list

Name *

Questions +

Question 1

Type of response expected *

Short text

Required *

Yes, the respondent must answer this question to continue

Question *

+ Add another

You can add as many or as few questions as you like and you can choose from the following question types:

- Short text (intended for short answers, around the length of a tweet)
- Long text (intended for much longer answers)
- Phone number
- Email
- Date
- Number

You can also mark fields as required or not.

Lastly, the final checkbox will allow you to share this application form with local parties in your Region.

When you're done, click Save or Save and add another if you'd like to add another form. This form can then be used in any selection in your region.

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Useful things to know

Problem Reports

On lots of records in Lighthouse you'll see an action button with a little ladybird icon and the words "Report a problem"

Clicking this will bring up a simple dialogue box that will allow you to put in some details about what's wrong with the record and this will then be sent directly to the team at LDHQ to review.

You can then track the progress of problems you've submitted under Tasks → Problems