

Survey of Official Agents following the 43rd General Election

Final Report

Prepared for Elections Canada

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Survey of Official Agents following the 43rd General Election Final Report

Prepared for Elections Canada by Environics Research Group.

Delivery Date: May 20, 2021

This public opinion research report presents the results of an online survey conducted by Environics Research Group from March 8 to 31, 2021.

Cette publication est aussi disponible en français sous le titre *Sondage auprès des agents officiels à la suite de la 43^e élection générale – Rapport final*.

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Table of Contents

Executive summary	i
Background and objectives	i
Methodology	i
Contract value	i
Key findings	ii
Political neutrality statement and contact information	iv
Introduction	1
I. Detailed findings	2
A. Information about Official Agents	2
B. Getting the campaign underway	4
C. Completing and submitting the electoral campaign return	6
D. Electronic Financial Return (EFR)	10
E. Elections Canada products and services	15
F. Post-filing Elections Canada contact	25
G. Closing of the campaign and other comments	28
II. Characteristics of Official Agents	30
III. Conclusions	32
Appendix A: Quantitative methodology	33
Appendix B: Research instruments	36

Executive summary

Background and objectives

Elections Canada (EC) identified the need to conduct quantitative research to understand how its current programs and services were used by Official Agents of the 43rd General Election held October 21, 2019, and to identify areas for improvement.

EC required the services of a public opinion research supplier to conduct a baseline Survey of Official Agents (OAs) following the 43rd federal General Election. This survey aimed to assess official agents' views and experiences with the 43rd General Election (GE) with regards to the financial obligations of the candidate campaign. An official agent is the person responsible for administering the candidate's campaign financial transactions and for reporting those transactions to Elections Canada as required by the *Canada Elections Act*.

The survey was conducted as part of the evaluation and development of EC's programs and services.

Methodology

Environics conducted an online survey with Official Agents from March 8 to 31, 2021. From a list of 1,847 unduplicated contact emails provided by Elections Canada, a total of 608 Official Agents completed an online interview, 33% of the records provided. The online survey was open from March 8 to 31, 2021. The participating respondents had the following regional distribution:

Breakdown/Location	Total	Atlantic	Quebec	Ontario	MB/SK	Alberta	BC	Territories
Number of interviews	608	60	137	229	44	58	77	3
% of completed interviews	100%	10%	23%	38%	8%	10%	13%	1%
% of total OA contacts	100%	9%	24%	36%	8%	10%	13%	1%

NOTE: This was an attempted census of the Official Agent population, and as such, no margin of sampling error is cited.

Contract value

The contract value was \$66,506.87 (HST included).

Report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the survey data. Provided under a separate cover is a detailed set of "banner tables" presenting the results for all questions for the total and identified subgroups of interest. These tables are referenced by the survey question in the detailed analysis.

In this report, quantitative results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the tables due to rounding.

Note on timing: Although official agents are required to file campaign returns four months after election day, many campaigns requested extensions to submit the return, and some official agents were still completing their activities at the start of the survey. Nonetheless, those official agents who filed the campaign return within the prescribed timeframes may have experienced a 12 month gap between when they filed and the start of the survey, which could contribute to recall issues. As well, a few activities included in the survey (opening a campaign account, training materials and use of other services available during the campaign) occurred over 15 months prior and thus recall may be an issue for some. A few survey participants (and some who refused to participate) indicated the time gap was too great; this should be kept in mind when designing future research with this audience. It should be noted that some of the activities of the OAs may have been affected because wrapping up the campaign took place during the COVID-19 pandemic.

Use of research: The information gained through this public opinion research will assist in the evaluation of EC's administration of the political financing regime. It will also assist in identifying areas where EC's various products and services may be improved.

Key findings

A. Information about Official Agents

- Two-thirds of OAs in the survey were first time agents, with the vast majority supporting a single candidate.
- One-third of candidates were in a nomination contest; one-third of OAs acted as the financial agent for one.

B. Getting the campaign underway

- Close to three-quarters say the obligation to open a campaign account was very clear; the most difficult aspects of opening a campaign account were dealing with the bank and sorting out the required documentation.

C. Completing and submitting the electoral campaign return

- Almost all were the official agent at the time the campaign return was submitted.
- Six in ten submitted the electoral campaign return via the Political Entity Service Centre (PESC).
- Just over four in ten attended training regarding the electoral return
- Agents are divided about the ease of completing the return, while just under six in ten agree to some extent it was easy to submit. The most difficult aspects of dealing with the campaign return are the lack of clarity of the completion and submission instructions, and the complexity of the form itself.

D. Electronic Financial Return (EFR)

- Nine in ten used the EFR software to prepare the campaign return; agents are most likely to agree to some extent that the instructions on how to find the EFR software were clear, and that it was easy to navigate.

- The very few who did not use the EFR software mention this was mostly because they preferred to prepare it manually, or that the software could not be installed.
- Over seven in ten indicate the campaign was required to file an external auditor's report with the return; most say it was at least somewhat easy to figure out if this was required.

E. Elections Canada products and services

- Of nine products and services, OAs most likely to report using the Political Financing Handbook or the 1-800 #, or to have corresponded with EC.
- The Political Financing Handbook, 1-800# and in-classroom sessions are the resources deemed helpful by the highest proportions of users.
- The main difficulties mentioned with the Political Financing website relate to navigation and presentation; training on how to deal with the return also may need improvement.
- Two-thirds who used the Political Entities Support Network strongly agreed that the EC employee they dealt with was courteous, and majorities agree to some extent with other positive statements about their experience. Two-thirds waited ten minutes or less on the 1-800 line.
- Six in ten of the OAs who corresponded with EC by mail or email strongly agree that the response they received by mail or email was courteous, and majorities agree to some extent with other positive statements about their contact with EC.
- Four in ten OAs used sources other than EC to understand provisions of the *Canada Elections Act*. Most who used other sources turned to the candidate's affiliated party, while a minority got advice from an accountant, other official agents or consulted the Act itself.
- The top product and service needs identified more flexible training availability, software updates, and a simplified process (especially for small campaigns).

F. Post-filing Elections Canada contact

- Just under two-thirds of OAs were contacted by EC after filing the campaign return. Nine in ten of these received an email.
- Majorities agreed with positive statements about their interactions with EC after their campaign return was submitted. Agreement is highest the EC employee was courteous, and lowest that they followed up regularly.

G. Closing of the campaign and other comments

- The easiest aspects of closing the campaign are closing the bank account and disposing of any surplus.
- Many OAs suggested improvements to the EFR software, a simplified process overall (especially for smaller campaigns), and more expedited auditing and reporting on EC's part to allow for prompt closure.

Political neutrality statement and contact information

I hereby certify as senior officer of Environics that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada, and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

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Introduction

Elections Canada (EC), headed by the CEO, an agent of Parliament, is an independent, non-partisan agency reporting directly to Parliament. EC exercises general direction and supervision over the conduct of elections and referenda at the federal level.

EC required the services of a public opinion research supplier to conduct a baseline survey of Official Agents following the 43rd federal General Election. This survey aimed to assess official agents' views and experiences with the 43rd General Election (GE) with regards to the financial obligations of the candidate campaign. An official agent is the person responsible for administering the candidate's campaign financial transactions and for reporting those transactions to Elections Canada as required by the *Canada Elections Act*.

The survey was conducted as part of the evaluation and development of EC's programs and services. The research objectives were to assess official agents' views and satisfaction regarding:

- the work involved in preparing campaign financial returns;
- level of support and quality of services received;
- access, quality, timeliness and responsiveness of services; and,
- EC's services, tools, products and training for official agents.

Data from this survey will be used by the Agency to:

- assess official agents' satisfaction with tools and services;
- improve tools and training developed and provided by EC;
- provide input for the Agency's performance indicators and reporting to Parliament;
- improve the overall administration of the political financing regime.

I. Detailed findings

A. Information about Official Agents

1. If this was the first time serving as an OA

Two-thirds of OAs in the survey were first time agents.

Two-thirds of the Official Agents of the 43rd General Election held October 21, 2019 were acting in that capacity for the first time; one-third had acted as an agent in a previous general election.

First time agent

Q2	Was it your first time acting as an official agent for a candidate campaign?	Total
	Yes	68%
	No	32%

The profile of first-time official agents is generally quite consistent across the country, with a few variations. There is a variation by age, with those under age 35 being the most likely to be first time agents (86%), and those age 55 and over being the least likely (62%). The following are also more likely to be first time agents:

- Those who work full time (74%, vs. 62% of retired OAs)
- Those who were OAs for one candidate (70%, vs. 39% who acted for more than one)
- Those who later in the survey say their campaign did not file an external auditor's report (75% vs. 63% who filed)

It should be noted that having a majority proportion of first time OAs suggests there may be an issue with the amount or type of work required of those undertaking the position. This is confirmed in the comments a number of OAs made at the end of the survey, regarding the large workload, complexity, frustrations with the EFR software, and suggestions that the position may be more suited to accounting professionals than community volunteers.

2. Number of candidates supported

The vast majority of agents supported a single candidate.

Over nine in ten OAs acted on behalf of one candidate for the 43rd GE.

Number of candidates

Q3 For how many candidates did you act as official agent in the October 2019 election?	Total
One	93%
Two	5%
Three	<1%
More than three	2%

A strong majority of respondents across the country report they were the OA for a single candidate, from 86 percent in Alberta to 96 percent in B.C. This proportion is marginally higher among first time OAs (96% vs. 87% who had served as an agent before).

The few OAs who acted for more than one candidate were asked, for the purposes of completing the survey, to consider their experiences representing the candidate with the most complex reporting requirements.

3. If candidate was in a nomination contest

One-third of candidates supported by OAs in the survey were in a nomination contest.

One-third of OAs report their candidate took part in a nomination contest prior to running as a candidate, over half said they did not, and one in ten are unsure.

Candidate was in nomination contest

Q4 Did your candidate take part in a nomination contest prior to running as a candidate in the general election?	Total
Yes	35%
No	55%
Not sure	10%

Having a candidate who took part in a nomination campaign is generally similar across the country, but lowest in Quebec (24%). It is similar across most subgroups of the OA population.

4. If OA acted as financial agent for the candidate's nomination campaign

One-third of OAs acted as the financial agent for their candidate's nomination contest.

Among those whose candidate participated in a nomination contest, one-third acted as their financial agent; six in ten did not. The proportion is similar across this subpopulation of OAs.

Was financial agent for nomination campaign

Q5 <i>Were you also the financial agent for the candidate's nomination campaign?</i>	OAs whose candidate was in a nomination campaign (n=213)
Yes	34%
No	62%
Not sure	4%

B. Getting the campaign underway

1. If requirement to open a campaign bank account was clear

Close to three-quarters say the obligation to open a campaign account was very clear.

Nine in ten OAs say the obligation to open a candidate campaign-specific bank account was at least somewhat clear, with the vast majority of these – almost three-quarters – saying it was very clear.

Requirement to open a campaign bank account was clear

Q6 <i>How clear was the obligation to open a bank account specifically for the candidate campaign?</i>	Total
Net: Clear	90%
Very clear	73%
Somewhat clear	18%
Net: Unclear	8%
Not very clear	4%
Not at all clear	4%
Not sure	1%

While high proportions across all subgroups indicate this requirement was at least somewhat clear, it is notably higher among those who acted as an OA before (95%), those who later in the survey say they filed an external auditor report (93%) and those who attended training about the return (94%).

2. Difficult aspects of opening a campaign bank account

The most difficult aspects of opening a campaign account were dealing with the bank and sorting out the required documentation.

Over half of OAs describe some kind of difficulty with opening the campaign account. The most common problems mentioned the bank was difficult to deal with, that it was unclear what documentation was required, or that obtaining the needed documentation was challenging. One in ten or fewer mention other issues, such as the bank staff not being prepared, or a having a lack of information on the process. Over four in ten say there were no difficult aspects to opening the campaign account.

Difficult aspects of opening a campaign bank account (Multiple responses were accepted)

Q7 What, if any, aspects of opening a bank account specifically for the candidate campaign were difficult?	Total
The bank was difficult to deal with	27%
Unclear what documentation was required	19%
Obtaining the correct documentation was challenging	12%
Bank/staff not prepared/needed more info on process/paperwork	6%
Lacked info on how to proceed (when to open/type of account etc.)	4%
Issues with naming the account	2%
Process/completing paperwork was difficult/challenging/took time	1%
Unable to open/access account electronically	1%
We didn't open an account/ran \$0 campaign	1%
Other	2%
No aspects were difficult	44%
Not sure	3%

In general, the types of difficulties mentioned are similar across the OA population, but there are a few differences:

- Mentioning the *bank was difficult to deal with* is higher in Alberta, Ontario and Quebec (30% each) than elsewhere, and is also higher among those under age 35 (48%), and decreasing to lowest among those aged 55 and over (21%).
- That *it was unclear what documentation was required to open the account* is higher among those under age 35 (24%).

C. Completing and submitting the electoral campaign return

1. If OA was official agent at time the electoral campaign return was submitted

Almost all were the official agent at the time the campaign return was submitted.

Almost all of the OAs in the survey were in this position at the time the campaign return was submitted. This is the case across all subgroups of the population.

Was official agent at time the electoral campaign return was submitted

Q8 <i>Were you the official agent at the time the electoral campaign return was prepared and submitted?</i>	Total
Yes	97%
No	2%
Not sure	1%

2. How electoral campaign return was submitted

Six in ten submitted the electoral campaign return via the Political Entities Service Centre (PESC).

Out of five possible methods for delivering the electoral campaign return, over six in ten report using the Political Entity Service Centre (PESC). One -quarter each say they used email or regular mail/courier for at least some portion of the delivery. Very few say they used in-person delivery or a fax.

Method(s) used to submit electoral campaign return

Note: multiple responses were permitted

Q9 <i>Which method(s) did you use to submit the electoral campaign return?</i>	Was OA when return was filed (n=589)
Political Entity Service Centre (PESC)	62%
Email	27%
Regular mail or courier services	27%
Delivered in person by the official agent or candidate	3%
Fax	<1%
Not sure	5%

PESC is the most used delivery method across the country, although four in ten OAs in Alberta and Manitoba/Saskatchewan also say they used email. Use of the PESC is also higher among those who report that they are employed full time, those who attended training regarding the return, and those who later report the return being easy to complete (although it does not vary by perceived ease of submission).

3. If OA attended training on how to complete and submit the electoral return

Just over four in ten attended training regarding the electoral return.

Those who were OAs when the campaign return was filed were asked if they attended training on how to complete and submit the form. Just over four in ten did, but a majority did not.

Attended training on how to complete and submit the electoral return

Q10 Did you attend training on how to complete and submit the return?	Was OA when return was filed (n=589)
Yes	43%
No	54%
Not sure	3%

Having attended training on form completion and submission is higher in BC (52%) and Manitoba/Saskatchewan (53%, vs. 34% to 45% elsewhere). It is not notably higher among first time OAs (44% vs 42% who were an OA in a previous election).

4. Ease of process of completing or submitting the electoral campaign return

Agents are divided about the ease of completing the return, while just under six in ten agree to some extent it was easy to submit.

Agents were asked to indicate how easy or difficult they found completing the return, and also the process of submitting the return. Opinion is divided regarding form *completion*, with just under half saying it was at least somewhat easy, and half saying it was at least somewhat difficult. Fewer than one in ten thought return completion was very easy.

Close to six in ten found the process of *submitting* the return to be at least somewhat easy, while four in ten found it difficult to some extent.

If process of completing or submitting the electoral campaign return was easy or difficult
Subgroup: Was OA when return was filed (n=589)

<i>Overall, would you say that the process of ... was...?</i>	Q11 Completing (filling out) the electoral campaign return	Q12 Submitting the electoral campaign return
Net: easy	47%	56%
Very easy	6%	14%
Somewhat easy	41%	41%
Net: difficult	51%	42%
Somewhat difficult	36%	27%
Very difficult	15%	15%
Not sure	2%	2%

Saying the process of completing the return was at least somewhat easy is similar across the country and most subgroups of the OA population. It is higher among the following groups:

- More experienced OAs (56%, vs. 42% of first time OAs)
- Those filing using PESC (51%)
- Those finding submitting the return easy (70%).

That the process of submitting the return was easy is also generally similar across the country (52% to 61%), although highest in Manitoba/Saskatchewan (70%). It is higher among the following groups:

- Those filing using PESC (58%)
- Those finding completion of the return easy (84%).

5. Difficult aspects of completing and submitting the electoral campaign return

The most difficult aspects of dealing with the campaign return are the lack of clarity of the completion and submission instructions, and the complexity of the form itself.

OAs were asked to indicate what aspects of dealing with the campaign return (completion or submission) were difficult, if any. Five potential options were provided (shown with asterisks in the table below), and respondents could write in additional issues. About one in four did not indicate any issues.

OAs are most likely to say the instructions for completing or submitting the return were unclear, or that the form was too complex. One-quarter indicate the training on how to complete the return needs improvement. One in ten or fewer mention other issues, with the highest unprompted difficulty being software-related issues, including the EFR being outdated or the website not being user friendly.

Difficult aspects of completing and submitting the electoral campaign return

Note: multiple responses were permitted

Q13 What, if any, aspects of completing and submitting the electoral campaign return were difficult?	Was OA when return was filed (n=589)
Instructions on how to complete the return were unclear*	31%
Instructions on how to submit the return were unclear*	31%
Form used to complete the return was too complex*	29%
Training provided on how to complete submit return needs improvement*	25%
Software issues/EFR outdated/website not user friendly	10%
Date by which to submit the return was unclear*	6%
Process difficult to manage/cumbersome/requirements hard to meet	4%
Difficulties in uploading/submitted forms/ended up mailing them	4%
Incompatible with Mac	3%
Too time consuming/tedious to complete/too much work	3%
Duplication of work/required to resubmit papers	2%
Other mentions (1% or less each)	9%
No aspects were difficult	19%
Not sure	5%

As can be expected, mentioning any kind of difficulty is higher among those who say either completing or submitting the return was difficult.

While the difficulties mentioned are quite similar by location and across most subgroups, the following are some notable differences:

- *The instructions on how to complete the electoral campaign return were unclear:* First time OAs (38% vs. 16% of others).
- *The instructions on how to submit the electoral campaign return were unclear:* Quebec (40%, vs 23% to 30% elsewhere).
- *The form used to complete the electoral campaign return was too complex:* Age 55+ (32%), First time OAs (34%), those representing one candidate (31%, vs. 13% 2 or more).
- *The training provided on how to complete and submit the electoral campaign return needs improvement:* BC (35%), Quebec (30%), filed return via mail/courier (34%), attended training (32%).
- *Software issues/EFR outdated/website not user friendly:* University degree (13%), candidate not in nomination contest (12% vs. 7% who were), did not file external auditor's report (16% vs. 8% who did file).
- *The date by which to submit the electoral campaign return was unclear:* Quebec (9%), first time OAs (7%).

D. Electronic Financial Return (EFR)

1. Using the EFR software to prepare the return

Nine in ten used the EFR software to prepare the campaign return.

Almost all OAs used the Electronic Financial Return (EFR) software to complete their campaign return, one in ten did not or could not recall.

If OAs used the EFR software to prepare the return

Q14 Did you use the Electronic Financial Return (EFR) software to prepare the return?	Was OA when return was filed (n=589)
Yes	89%
No	8%
Not sure	3%

Using the EFR to complete the return is the dominant response across the country and across all population subgroups. It is higher among the following groups:

- More experienced OAs (94%, vs. 87% of first time OAs)
- OAs who attended training about the return (96%, vs. 84% who did not attend)
- Those filing using the PESC (97%)
- Those who filed an external auditor report (93%, vs. 83% who did not).

2. Agreement with statements about using the EFR software

Agents are most likely to agree to some extent the instructions on how to find the EFR software were clear, and that the software was easy to navigate.

OAs were asked to indicate their level of agreement with five statements about working with the EFR. Six in ten or more agree with the three positive statements presented: that the instructions on how to locate the software were clear (76% agree); that the software was easy to navigate (65%); and that it was easier to file the financial return this way as opposed to the manual process (60%). Note that one in four were unable to provide a response for this last statement, potentially because there are so many first time OAs who have no experience with manual reporting. However, among those who gave an opinion, eight in ten think it was easier to file with EFR.

Half of OAs agree to some extent the instructions on how to use the software and provide the submission file were not clear, and three in ten agree the software was not easy to install.

Method(s) used to submit electoral campaign return Subgroup: Those who used the EFR for the campaign return (n=524)

Q15-19 To what extent do you agree or disagree with the following statements about using the Electronic Financial Return (EFR) software to prepare the return?	Net agree (very + somewhat)	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
Instructions provided by EC on how to find this software were clear	76%	22%	53%	14%	8%	2%
EFR software was easy to navigate	65%	11%	53%	23%	11%	2%
It was easier to file the financial return using the EFR software than with the manual process	60%	24%	36%	8%	7%	25%
Instructions on how to use EFR software and provide the submission file were not clear	49%	11%	39%	37%	10%	4%
EFR software was not easy to install	29%	9%	20%	42%	27%	3%

Overall agreement with these statements is generally similar across the country and most subgroups of the OAs using the software, with some exceptions. In general, those who say they found either completing or submitting the return easy are more likely to agree with positive statements, while those finding these activities difficult are more likely to agree with the negative statements. Below are the other groups more likely to agree with each statement:

- *The instructions provided by Elections Canada on how to find this software were clear:* More experienced OAs (82%, vs. 72% of first time OAs)
- *The EFR software was easy to navigate:* More experienced OAs (73%, vs. 60% of first time OAs)

- *It was easier to file the financial return using the EFR software than with the manual process:* More experienced OAs (73%, vs. 53% of first time OAs), those supporting two or more candidates (81%, vs. 58% with one candidate), those with a candidate in a nomination contest (67% vs. 57%), those who filed using PESC (61%)
- *The instructions on how to use the EFR software and provide the submission file were not clear:* Quebec (60%, vs. 43% to 55% of others)
- *The EFR software was not easy to install:* Manitoba/Saskatchewan (48%, vs. 19% to 36% of others), first time OAs (33% vs. 21%), those representing one candidate (31%, vs. 5%), and those who found the return difficult to complete (36% vs. 23%) or submit (37% vs. 23%).

3. Why EFR was not used to prepare the return

The very few OAs not using the EFR software mostly mention that they preferred to prepare it manually, or that the software could not be installed.

The small number of OAs who did not use the EFR to file the campaign return (n=47) were asked why. They were given six potential reasons (marked with an asterisk in the table below) and allowed to specify others if needed. The main reasons for not using EFR are preferring to prepare the return manually, and technical issues preventing installation of the software. Two in ten or fewer cite the other reasons presented in the survey. Subgroup sizes are too small to permit deeper analysis.

Why EFR was not used to prepare the return *Note: multiple responses were permitted*

Q20 Why did you not use the Electronic Financial Return (EFR) software to prepare the return?	Those who did not use EFR to prepare the return (n=47**)
Prefer to prepare the financial return manually*	38%
EFR software could not be installed on my computer*	28%
Instructions to install the EFR software were not clear*	19%
Instructions on how to provide the EFR submission file were not clear*	17%
User Guide for the EFR software was difficult to find*	13%
There was an error when I attempted to submit the final financial return file electronically*	6%
Other (n=14)	30%

**Note: small base (n<50); interpret with caution

Fourteen OAs provided other comments. Three indicate the return was prepared by an auditor or accountant. Three mention the EFR software is not compatible with their computers/operating systems. Two either say they did not use technology or had limited access to the Internet. Two indicate having no expenses. One person used their own system in MS Excel. One was not sure. Two other comments indicate issues with the instructions:

Elections Canada's wording was not very friendly and mostly threatening.

Would love, love, loved to have done it electronically, rather than manually. Better instruction would be necessary to help.

4. If campaign was required to file an external auditor's report with return

Over seven in ten indicate the campaign was required to file an external auditor's report with the return.

Just over seven in ten OAs say the campaign was required to file an external auditor's report with the electoral campaign return, while two in ten say they were not required to do so, and six percent are not sure.

If campaign was required to file an external auditor's report with return

Q21 Was the candidate's campaign required to file an external auditor's report with the electoral campaign return?	Was OA when return was filed (n=589)
Yes	72%
No	22%
Not sure	6%

That the campaign was required to file an external auditor's report is generally similar across most subgroups of the PA population, but higher among the following groups:

- Quebec (81%) and Atlantic region (80%)
- Candidate was in nomination contest (81%, vs. 69% who were not)

5. Ease or difficulty of finding out if auditor's report was required

Most say it was at least somewhat easy to figure out if an auditor's report was required.

Close to nine in ten say it was at least somewhat easy to figure out whether or not an auditor's report was required; only 1 in 10 say that it was difficult.

Ease or difficulty of finding out if auditor's report was required

Q22 How easy or difficult was it to figure out whether an auditor's report was required with the electoral campaign return?	Was OA when return was filed (n=589)
Net: easy	85%
Very easy	55%
Somewhat easy	30%
Net: difficult	9%
Somewhat difficult	7%
Very difficult	2%
Not sure	6%

A majority of OAs, both those who filed an external auditor's report and those who did not, say it was easy to determine if this was required, but those who filed are more likely to say it was very easy (61% vs. 48%).

Saying this aspect was at least somewhat easy is highest among the following groups:

- Age 55 and over (88%)
- University degree (89%, vs. 76% with high school or less)
- Retired OAs (93%)
- More experienced OAs (91%, vs. 83% first time)
- Those who attended training on the return (89% vs. 83%)
- Those who say completing (92%) or submitting (89%) the return was easy

E. Elections Canada products and services

1. Awareness and use of EC products and services

Of nine products and services, OAs are most likely to report having used the Political Financing Handbook or the 1-800 number, or to have corresponded with EC.

OAs were shown a list of EC products and services and asked to indicate which they had heard of or used. Almost all candidates are either aware of or used at least one (6% did not use any of these, and 3% are neither aware of nor used any). The services with the highest overall awareness (either used or familiar with) are the Political Financing Handbook, correspondence with EC and the Political Entities Support Network toll-free number. Six in ten are aware of or used the in-classroom sessions. Around half report having been aware of or using either the EFR videos or the Political Financing Newsletter. Fewer than half report being aware of or using the other services, with the lowest overall awareness being for the computer lab sessions to close the campaign (six in ten not aware of this resource).

Usage follows a similar pattern to overall awareness. Over eight in ten say they used the Political Financing Handbook, close to seven in ten say they corresponded with EC, and six in ten indicate use of the PESN. One in ten or fewer report using any of the other resources.

Awareness and use of EC products and services

Q23-31 This next section asks for your opinion about some of the products and services Elections Canada makes available for candidate campaigns. Did you use, or were you aware of, the following Elections Canada products and services?	Net aware (used + aware)	Yes, used it	Aware of but not used	Not aware	Not sure
Political Financing Handbook for Candidates and Official Agents	91%	83%	8%	6%	2%
Correspondence with EC	88%	68%	20%	8%	4%
Political Entities Support Network 1-800 #	77%	60%	17%	20%	4%
In-classroom info sessions to start the campaign	61%	31%	30%	35%	4%
Electronic Financial Return (EFR) videos	52%	28%	24%	43%	5%
Political Financing Newsletter	49%	31%	18%	44%	7%
Webex information session for official agents and candidates	45%	17%	28%	48%	7%
Political Financing videos (“cartoons”)	43%	21%	23%	51%	5%
Computer lab sessions to close the campaign	35%	13%	22%	59%	5%

Overall awareness (either used or aware of) and actual usage proportions are quite similar across the country and across subgroups of the OA population. Not being aware of most resources is higher among first time agents.

Below are some groups reporting higher actual usage:

- *Political Financing Handbook for Candidates and Official Agents*: University graduates (87%), more experienced OAs (88%, vs. 81% first time), filed external auditor's report (88% vs. 78%), attended training re return (92% vs. 77%)
- Correspondence with EC: Attended training regarding the return (76% vs. 63%)
- *The Political Entities Support Network 1-800 #*: Quebec (70%), filed external auditor's report (64% vs. 56%), completing return was easy (65% vs. 58%)
- Political Financing Newsletter: Age 55 and over (35%), retired (41%), more experienced OAs (43%, vs. 26% first time), attended training regarding the return (41% vs. 25%), completing return was easy (38% vs. 25%), submitting return was easy (35% vs. 27%)
- *In-Classroom information sessions*: BC (41%), age 55 and over (37%), retired (41%), attended training regarding the return (56% vs. 11%), submitting return was easy (35% vs. 27%)
- *EFR videos*: Single candidate OAs (29%, vs. 12% multiple candidate), attended training regarding the return (41% vs. 17%)
- *Political Financing videos ("cartoons")*: Single candidate OAs (22%, vs. 7% multiple candidate), used PESC (24%), attended training re return (28% vs. 15%)
- *Webex information sessions*: Candidate in nomination contest (22%, vs. 15% not in nomination contest), filed external auditor's report (19% vs. 11%), attended training regarding the return (30% vs. 6%)
- *Computer lab sessions*: BC (20%), Quebec (19%), attended training regarding the return (29% vs. 2%)

2. If EC products and services used were helpful

The Political Financing Handbook, 1-800# and in-classroom sessions are the resources deemed helpful by the highest proportions of users.

Those who used any products were shown a list of the ones they used and asked to indicate which they found helpful. Almost all who used the Political Financing Handbook indicate it was helpful, and around eight in ten using either the Political Entities Support Network 1-800 number or in-classroom sessions report finding them helpful. A strong majority also say either the computer lab sessions, correspondence with EC, the Political Financing Newsletter and the Political Financing cartoons to be helpful. Users are least likely to indicate that the EFR videos or the Webex information session were helpful.

Helpful products/services
Bases: Those using each product/service

Q32 Which, if any, of these products did you find helpful?	% saying resource was helpful
Political Financing Handbook (n=506)	91%
Political Entities Support Network 1-800 # (n=366)	81%
In-classroom info sessions to start the campaign (n=188)	78%
Computer lab sessions to close the campaign (n=82)	73%
Correspondence with EC (n=415)	70%
Political Financing Newsletter (n=190)	63%
Political Financing videos (“cartoons”) (n=125)	59%
Electronic Financial Return (EFR) videos (n=170)	55%
Webex information session (n=103)	47%

That various resources are helpful is quite similar across the country and among the OA population. In general, first time agents are more likely than those with experience to report resources being helpful. A few notable findings follow:

- Thinking the toll-free number was helpful is higher among Albertans (97%). Three-quarters (74%) of Quebec OAs who used the Political Financing cartoons found them helpful.
- The Handbook is deemed helpful by higher proportions of those with a university degree (93%), more experienced OAs (94%, vs. 89% first time) and those who found the return easy to complete (95%) or submit (94%).
- Those acting for Liberal Party candidates are somewhat less likely than others to say the toll-free number was helpful (70%, vs. 81% to 88% supporting other party candidates).

Agents could also indicate if another resource they used was helpful. Mentions mainly include phone calls to EC, various auditors or accountants, the associated political party and/or previous OAs.

3. Difficult aspects of finding products/services on EC Political Financing website

The main difficulties with the Political Financing website are related to navigation and presentation; training on dealing with the return also may need improvement.

All official agents were asked what, if any, aspects of finding what they needed on Elections Canada’s Political Financing pages on its website were difficult. Five potential difficulties were provided (marked with an asterisk in the table below) and agents could write in other challenges they experienced. Three in ten say they experienced no issues. The most mentioned difficulties are that the products for OAs are not clearly presented, and that the site is hard to navigate. Three in ten also think that training for return completion and submission needs improvement. Two in ten say there is too much information on the site, and close to one in ten state the links did not work. Of the volunteered responses, the most mentioned are that the EFR software is out of date or needs improvement, or that the process is complicated.

Difficult aspects of finding products/services on EC Political Financing website

Q33 What, if any, aspects of finding the products or services you were looking for on Elections Canada’s Political Financing website were difficult?	Total
Products for Official Agents are not clearly presented*	35%
Political Financing website is hard to navigate*	35%
Training on how to complete and submit the return needs improvement*	31%
Too much information on the Political Financing website*	22%
Links on the Political Financing website did not work*	8%
EFR is out of date/needs improvement	2%
Process is complicated	2%
Other	8%
There were no difficulties	29%

Reporting at least one difficulty is similar whether or not someone was a first time agent; having no difficulties is higher among men and those reporting either return completion or submission as easy.

The proportions reporting each challenge are quite similar across the country, but OAs in Quebec are the most likely to indicate the products were not clearly presented (45%). Saying that the products are not clearly presented is lower among those with a university degree. Saying that the website is hard to navigate is higher among those who submitted the return by mail or courier (43%).

4. Agreement with statements about the Political Entities Support Network

Two-thirds of OAs strongly agree that the EC employee they dealt with via the PESN was courteous, and a majority agree to some extent with other positive statements about their experience.

Those OAs who indicated they used the Political Entities Support Network (n=366) were asked to indicate their level of agreement with five statements about the service they received. Strong proportions of close to nine in ten or more agree to some extent with all statements. Two-thirds strongly agree the employee with whom they dealt was courteous, and just under half strongly agree that the employees were knowledgeable or that, in the end, they received got what they needed. Just over four in ten agree strongly they received a timely response or that they were satisfied with ease of access to the service.

Agreement with statements about the Political Entities Support Network Subgroup: Those who used the Political Entities Support Network (n=366)

Q34-38 To what extent do you agree or disagree with the following statements about the service you received from the EC 1-800 number for political entities?	Net agree (very + somewhat)	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
The Elections Canada employee was courteous	97%	66%	31%	1%	0%	2%
The Elections Canada employee was knowledgeable	90%	46%	44%	7%	1%	3%
In the end, I got what I needed	88%	46%	42%	5%	2%	4%
I received a response in a timely manner	87%	42%	45%	9%	1%	3%
I was satisfied with the ease of access to the service	87%	42%	44%	8%	2%	3%

Strong agreement with these statements is very consistent across the country and most subgroups, but somewhat higher among OAs with university degrees and those who found return submission easy.

5. Wait time for 1-800 number

Two-thirds waited ten minutes or less on the 1-800 number line.

Those OAs using the Political Entities Support Network (1-800 number) were asked to indicate the approximate wait time they experienced before speaking with an EC employee. Two-thirds reached someone in 10 minutes or less (with one-third reporting a wait of three minutes or less), one in ten left a message for a callback, and one-quarter cannot recall.

Wait time for 1-800 number

Q39 <i>When you contacted Elections Canada through the 1-800 number for political entities, approximately how long did you wait before speaking with an Elections Canada employee?</i>	Those who used the Political Entities Support Network (n=366)
Net: 10 minutes or less	65%
1-3 minutes	34%
4-6 minutes	23%
7-10 minutes	7%
More than 10 minutes	4%
Left a message for a callback	9%
Not sure	23%

Reporting a short wait time of three minutes or less is fairly similar by location, but higher in Atlantic Canada than elsewhere (46%). A wait time of three minutes or less is reported in a higher proportion of more experienced OAs (46%, vs. 28% of first time agents) but is fairly consistent by other factors.

6. Agreement with statements about corresponding with Elections Canada

Six in ten strongly agree the response they received by mail or email was courteous, and majorities agree to some extent with other positive statements about their contact with EC.

OAs indicating they corresponded with EC by mail or email (n=415) were asked to indicate their level of agreement with four statements about the service they received. Eight in ten or more agree at least somewhat with each; overall and strong agreement are highest that the response was courteous.

Agreement with statements about corresponding with Elections Canada Subgroup: Those who corresponded with EC (n=415)

Q40-43 To what extent do you agree or disagree with the following statements about the service you received while corresponding by mail or email with Elections Canada:	Net agree (very + somewhat)	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
The response was courteous	96%	59%	37%	2%	<1%	2%
The response was informative	88%	45%	43%	7%	2%	3%
In the end, I received the information I needed	85%	44%	41%	7%	2%	6%
The response was timely	82%	41%	41%	11%	4%	4%

Strong agreement with these statements is statistically similar across the country and most subgroups of the OA population. Strong agreement with all statements is somewhat higher among OAs who say their candidate was not in a nomination contest, and those reporting the return was easy to complete or submit.

7. Other sources used to understand provisions of the *Canada Elections Act*

Four in ten used other sources to understand provisions of the Canada Elections Act. Most who used other sources turned to the candidate's affiliated party, while a minority sought advice from either an accountant, other official agents or consulted the Act itself.

Four in ten OAs indicate that they consulted sources other than EC to understand what was required under the *Canada Elections Act*; close to six in ten say they did not, and a small minority of three percent are not sure.

Used any other sources to understand provisions of the *Canada Elections Act*

Q44 Did you consult any sources other than Elections Canada to understand the financial and reporting provisions of the Canada Elections Act as they relate to candidates and how they applied in your situation?	Total
Yes	41%
No	56%
Not sure	3%

Reporting using sources beyond EC is generally similar across the OA subgroups, but somewhat higher among the following:

- Ontario (47%)
- Those with college or more education (43%, vs. 14% with high school or less)
- Those with one candidate (42%, vs. 27% with more than one)
- OAs who filed an external auditor report (46% vs. 32% who did not)
- Those who attended training on the return (50%, vs., 36% who did not)
- Those who found the return difficult to complete (47% vs. 36% who did not)

Those who report using other resources beyond those provided by EC (n=250) were asked what they used to help them understand what was required. Seven options were offered (marked with an asterisk in the table below) and OAs could specify additional resources if required. The most commonly used resources are the candidate's affiliated political party, an accounting firm or other official agents. One-quarter consulted the *Canada Elections Act* itself, and two in ten turned to the affiliated electoral district association. Fewer used other resources. The main resource volunteered was auditors (13%).

Other sources to understand provisions of the *Canada Elections Act*

Q45 What sources did you consult?	Those using non-EC sources (n=250)
Affiliated political party*	56%
Accounting firm*	38%
Other official agents*	32%
<i>Canada Elections Act</i> *	27%
Affiliated electoral district association, if applicable*	20%
Auditor/campaign auditor	13%
Law firm*	2%
Media articles*	1%
Not sure	1%

Some of the subgroups are small and do not permit deeper analysis. Turning to the affiliated political party is highest among OAs in Quebec (77%) and among first time OAs (60%) and those whose candidate was not in a nomination contest (60%).

8. Product and service gaps

The top product and service needs identified are more flexible training availability, the need to provide more examples, providing software updates and simplifying the process.

All OAs were asked if there were other products or services Elections Canada could have provided that would have made serving as an official agent easier. This was an open-ended question with no pre-coded options. One in ten mention a requirement for more flexible training that can be undertaken at any time. Fewer than one in ten mention other individual suggestions, including providing more examples about what expenses to report, updating the software and making it be compatible with a wider range of platforms, simplifying the process and eliminating duplication, and making the EFR more user friendly. One-quarter do not think there are any additional products or services that would help them, and four in ten are unsure.

Product and service gaps

Note: multiple responses were permitted

Q46 Are there any other products or services Elections Canada could have provided that would have made serving as an official agent easier for you?	Total
Training available to OA any time they join/training videos/step-by-step guide	10%
Provide more info/examples to clarify process/what expenses to report	7%
Software to be updated/compatible with all OS (MAC, Linux etc.)	6%
Simplify process/more straightforward/get rid of duplicate paperwork/audit	5%
Update EFR/make it more user friendly/better links	5%
Dedicated knowledgeable staff support to guide/discuss/provide feedback	4%
Make report transmission easier/fillable PDFs or converter needed	3%
Provide a check list for forms to be completed	2%
To confirm receipt once papers/reports are submitted/have an audit sent on time	2%
Contact information to access local office/service when needed for support/inquiry	2%
Other	5%
Nothing else	24%
Not sure	40%

Mentions are generally similar across the population. Those who say they found the return difficult to complete are more likely than those who found it easy to mention more flexible training or updating software. Wanting additional examples is higher among those acting for one candidate (8% vs. 2%) and those who submitted the return by mail or courier (13%).

F. Post-filing Elections Canada contact

1. If contacted by EC for clarifications or additional information since return was filed

Just under two-thirds of OAs were contacted by EC after filing the campaign return.

Over six in ten OAs were contacted by EC for clarifications or additional information since the filing of the return. That a strong majority were in this position would tend to confirm the impressions indicated by some OAs in other questions, that the process is very complicated and/or that the instructions provided to OAs by EC need refinement.

If contacted by EC for clarifications or additional information since return was filed

Q47 Have you been contacted by Elections Canada for clarifications or additional information since the electoral return was filed?	Total
Yes	62%
No	36%
Not sure	3%

A majority of OAs in all regions indicated having been contacted following the report submission, although this is lower in Manitoba/Saskatchewan (52%) and Quebec (55%) than elsewhere (61% to 71%). The proportion does not differ substantially by other factors, including whether or not someone was a first time OA or whether they found completing the return easy or difficult. It is lower among those who filed using PESC (60% vs. 69% of others) and among those who were not required to file an external auditor report (38%, bs. 71% who did).

2. How post-filing EC contact was made

Nine in ten who were contacted by EC after the return was filed received an email.

Those who were contacted by EC following their submission of the campaign return (n=375) were asked how this contact was made (OAs could indicate both potential contact methods). Overall, about nine in ten state it was via email (and for 59% contact was only by email), while four in ten say they received a phone call (9% telephone only).

How post-filing EC contact was made
Note: multiple mentions were permitted

Q48 How did Elections Canada contact you?	Those contacted by EC since electoral return was filed (n=375)
Email only	59%
Telephone only	9%
Both telephone and email	31%
Email (net)	89%
Telephone (net)	40%
Not sure	1%

Receiving EC communicating by email is the top response across the country and all subgroups, Subgroup bases can be small for this group, so limited analysis can be done at that level. More experienced OAs are more likely than first time OAs (52% vs. 34%) to have received a telephone call.

3. Agreement with statements about interactions with EC after the return was filed

Majorities agree with each of four statements about their EC interactions after the return was filed. Agreement is highest that the EC employee was courteous, and lowest that they followed up regularly.

Those who were contacted by EC following the return submission were asked to indicate their level of agreement with four statements about this interaction. Two-thirds or more agree to some extent with each statement. Overall and strong agreement is highest that the employee was courteous, and lowest that EC followed up regularly after initial contact.

The statement regarding regular follow-up had one in ten not being sure, which may indicate a short and simple request that did not require much follow-up. When those one in ten are removed and the proportions recalculated, 75 percent agree overall there was regular follow-up, and one-third agree strongly.

Agreement with statements about interactions with EC after the return was filed Subgroup: Those contacted by EC since electoral return was filed (n=375)

Q49-55 To what extent do you agree or disagree with the following statements about your interaction with Elections Canada after the return was filed:	Net agree (very + somewhat)	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
Elections Canada employee was courteous	94%	53%	42%	3%	1%	2%
Elections Canada employee responded to my questions in a timely manner	84%	37%	47%	7%	3%	6%
Elections Canada employee was knowledgeable	83%	43%	40%	10%	2%	5%
Elections Canada employee provided sufficient time to complete the task	83%	36%	46%	9%	5%	3%
Elections Canada employee clearly described the steps needed to complete the task	82%	36%	46%	11%	3%	3%
It was easy to submit the requested information	75%	34%	41%	16%	5%	4%
Elections Canada employee followed up regularly after the initial contact until the task was complete	67%	29%	37%	16%	6%	11%

Strong agreement with positive statements about EC interactions is generally similar across most subgroups; it is higher among those who report that the return was easy to complete or submit. While overall level of agreement is similar to others, strong agreement with several statements is lower in BC than elsewhere.

G. Closing of the campaign and other comments

1. Ease or difficulty of completing steps for closing the campaign

The easiest aspects of closing the campaign are closing the bank account and disposing of any surplus.

OAs were asked to indicate how easy or difficult they found each of four steps for closing the campaign. The easiest step was closing the campaign bank account, followed by the disposing of any surplus and fulfilling reporting requirements. Just under half found completing and submitting the statement of surplus to be easy to some extent. Around two in ten (22%) did not indicate that any of these tasks was easy.

Three of these statements received relatively high proportions of OAs indicating “not sure,” two being related to surplus, which the campaign may not have had, and one related to closing the campaign bank account, which could be because some OAs reported in comments that this was not able to be done due to the audit schedule.

Ease or difficulty of completing steps for closing the campaign

Q56-59 For each of the following steps for closing the campaign, please indicate how easy or difficult it was to complete:	Net easy (very + somewhat)	Very easy	Somewhat easy	Somewhat difficult	Very difficult	Not sure
Closing the campaign bank accounts	65%	32%	33%	10%	6%	19%
Disposing of any surplus	57%	24%	32%	12%	5%	27%
Fulfilling all reporting obligations before closing the campaign	56%	16%	40%	29%	9%	6%
Completing and submitting the statement of surplus	48%	16%	32%	19%	8%	25%

OAs in Atlantic Canada are the most likely to indicate closing the campaign bank account was easy, but otherwise the results are quite similar by region. Indicating most tasks were easy is higher among those with university degrees, more experienced OAs, and those who found the return easy to complete or submit.

2. Other comments

Many OAs suggest improvements to the EFR software, a simplified process overall and especially for smaller campaigns, and more expedited auditing and reporting on EC's part to allow for prompt closure.

OAs provided a range of comments when asked if there was anything not covered in the survey they would like to share. While a number mentioned it was an interesting, positive or learning experience, or said good things about the people at EC with whom they dealt, there were a large number of negative mentions about the OA position.

Several provide comments touching on how complicated or time-consuming the position is, how long the entire process takes, or how they will not be doing it again. There were repeated calls to improve the EFR software,

which was deemed clumsy, outdated, and not compatible with several platforms. There were comments about how the reporting requirements are overkill for small campaigns, and several mentions about delays on EC's side in completing the final report that prevented closure. There were a few mentions about being told to close the bank account before the final audit was completed, which caused issues when refunds were due. There were also mentions about how a bank accounts should be optional, or that bank accounts should allowed to remain open between elections.

II. Characteristics of Official Agents

The following tables show the characteristics of the respondents to the OA survey.

Age	N	%
18-34	50	8%
35-44	67	11%
45-54	96	16%
55-64	148	24%
65-74	212	35%
75+	35	6%

Gender	N	%
Female	213	63%
Male	382	35%
Other/refused	13	2%

Language spoke most often at home	N	%
English	591	97%
French	16	3%
Other	10	2%

Language of survey	N	%
English	488	80%
French	120	20%

Education	N	%
Less than a high school diploma or equivalent	2	<1%
High school diploma or equivalent	34	6%
Registered Apprenticeship/other trades/trades certificate	14	2%
College, CEGEP, non-university certificate/diploma	99	16%
University below bachelor's level	56	9%
Bachelor's degree	195	32%
Postgraduate degree above bachelor's level	197	32%
Prefer not to say	11	2%

Employment	N	%
Working full-time	225	37%
Working part-time	28	5%
Self-employed	109	18%
Unemployed, but looking for work	13	2%
A student attending school full-time	2	0%
Retired	209	34%
Not in the workforce	11	2%
Other	5	1%
Prefer not to say	6	1%

Province/Territory	N	% in survey	% of OA list
BC	77	13%	13%
AB	58	10%	10%
MB	22	4%	4%
SK	22	4%	4%
ON	229	38%	36%
QC	137	23%	24%
NB	22	4%	3%
NS	26	4%	3%
PE	5	1%	1%
NL	7	1%	2%
Territories	3	<1%	1%

III. Conclusions

The high turnover of Official Agents (with almost seven in ten reporting as first time OAs in this survey) indicates this role's challenges and frustrations are outweighing its rewards, and the comments received from respondents to the survey confirm this. It is potentially problematic, especially for aspiring new politicians with small campaign budgets, if the OA role requires extensive accounting experience and/or a large amount of time and effort to complete properly. The work EC has done to provide training and supportive materials has been appreciated, and EC staff receives generally high marks for courtesy and helpfulness, but more needs to be done to ensure the level of effort required of this role is not overly onerous and that repetitive tasks are minimized or eliminated.

The following are suggestions for EC's consideration, stemming from survey responses and comments:

- Make changes to OA training so the bulk of it is available to OAs coming on board at any time during the campaign;
- Include more examples of expenses and reporting situations in training materials;
- Make improvements to EFR and make it entirely online or available across multiple computer platforms;
- Have a simplified/fast track process for small campaigns/first time candidates/under \$10,000 or zero budget campaigns; amend the *Canada Elections Act* to make opening a campaign bank account optional for zero budget campaigning; and
- Review the requirements and identify and reduce/eliminate duplication where possible.

Appendix A: Quantitative methodology

Background and research objectives

Elections Canada (EC), headed by the CEO, an agent of Parliament, is an independent, non-partisan agency that reports directly to Parliament. EC exercises general direction and supervision over the conduct of elections and referendums at the federal level.

EC required the services of a public opinion research supplier to conduct a baseline Survey of Official Agents following the 43rd federal General Election. This survey aimed to assess official agents' views and experiences with the 43rd General Election (GE) with regards to the financial obligations of the candidate campaign. An official agent is the person responsible for administering the candidate's campaign financial transactions and for reporting those transactions to Elections Canada as required by the *Canada Elections Act*.

Use of research: The information gained through this public opinion research will assist in the evaluation of EC's administration of the political financing regime. It will also assist in identifying areas where EC's various products and services may be improved.

Methodology

Environics conducted a survey of official agents who submitted an electoral campaign return following the 2019 GE, through a self-administered online questionnaire.

Elections Canada provided Environics with contact information for 1,847 (unduplicated) Official Agents. A total of 608 Official Agents completed the survey, representing 33% of the records provided. The online survey was open from March 8 to 31, 2021.

The participating respondents have the following regional distribution:

Breakdown/Location	Total	Atlantic	Quebec	Ontario	MB/SK	Alberta	BC	Territories
Number of completed interviews	608	60	137	229	44	58	77	3
% of completed interviews	100%	10%	23%	38%	8%	10%	13%	1%
% of total OA contacts	100%	9%	24%	36%	8%	10%	13%	1%

This is an attempted census rather than a sample survey, and a margin of sampling error does not apply.

Note on timing: Although official agents are required to file campaign returns four months after election day, many campaigns requested extensions to submit the return, and some official agents were still completing their activities at the start of the survey. Nonetheless, those official agents who filed the campaign return within the prescribed timeframes may have experienced a 12 month gap between when they filed and the start of the survey, which could contribute to recall issues. As well, a few activities included in the survey (opening a campaign account, training materials and use of other services available during the campaign) occurred over 15 months prior and thus recall may be an issue for some. A few survey participants (and some who refused to participate) indicated the time gap was too great; this should be kept in mind when designing future research with this audience. It should be noted that some of the activities of the OAs may have been affected because wrapping up the campaign took place during the COVID-19 pandemic.

Instrument design

Environics designed a questionnaire that addresses the study objectives, with input and feedback from EC. It underwent numerous iterations prior to approval and translation. Environics also drafted an advance email from Elections Canada and the invitation email and reminders. The communications included all required information. EC was responsible for translation of all instruments.

The questionnaire median length was 17.5 minutes, and the average was 12.5 minutes. All research instruments are appended (Appendix B)

Pre-test

Environics sent out 50 English and 30 French pretest invitations on March 8, 2021 from which 14 interviews (9 English, 5 French) were completed. The pretest included standard, government-accepted probing questions on comprehension and appropriateness of language at the end of the survey, and no issues were identified. However, comments received from some OAs indicated the length of time that had passed between the election and the survey was detrimental to participation.

Fieldwork

The survey was conducted according to the following steps:

- Environics programmed the questionnaire using state-of-the-art survey software, hosted on a secure server. Environics ensured the data were stored on Canadian servers located and only accessible in Canada, and physically independent from all other databases, directly or indirectly, that are located outside Canada.
- At the client's request, Environics emailed a bilingual letter to 1,947 unduplicated contacts on behalf of EC explaining the survey was imminent and requesting cooperation. Following this broadcast, nine contacts asked to be removed from the list.
- Bilingual invitation emails were then sent to 1,838 official agents; the URL link directed respondents to a bilingual landing page to offer an active survey language choice. The invitations allowed potential respondents to opt out of the survey and unsubscribe from future reminders.
- Two reminder emails were sent to any remaining non-respondents to the initial invitation, to maximize response rate. The invitation and reminder emails also provided an option to opt-out of the survey.
- Environics provided technical support to survey respondents as required. Steps were taken to assure (and also guarantee) complete confidentiality and anonymity of survey responses.
- Environics kept the project authority advised on the status of data collection on a regular basis throughout the field period.
- Environics electronically captured all survey responses as they were submitted, and created an electronic data file to be coded and analysed.

All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada

Public Opinion Research – Online Surveys, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA). Environics registered the survey with the Research Verification Service (RVS) of the Canadian Research Insight Council (CRIC), to allow participants to verify the legitimacy of the survey, register a complaint, get information about the survey industry or ask technical questions about the survey.

Following data collection and prior to analysis, data analysts performed a data-cleaning and validation process, in accordance with the highest industry standards. Open-ended question data were coded and Environics designed banner tables in consultation with the project authority. Data tables were submitted in Excel and CSV format; verbatim comments were made available in an Excel document.

Completion results

This survey consisted of 608 interviews with Official Agents. The response rate for the survey is 34 percent. The disposition of all contacts is presented in the following table:

Completion results

		N
Total invitations	(c)	1,838
Total completes	(d)	608
Qualified break-offs	(e)	77
Disqualified	(f)	12
Not responded	(g)	1,141
Quota filled	(h)	0
Contact rate = (d+e+f+h)/c		37.92
Response rate = (d+f+h)/c		33.73

Appendix B: Research instruments

Advance e-mail broadcast



Subject: Survey of Official Agents

(le texte français suivra)

Dear [NAME],

As part of its post-election activities, Elections Canada is reaching out to the official agents of candidates in the general election of October 21, 2019 about their experiences with the electoral campaign return process, during and/or following the election.

As an official agent, you are uniquely able to provide informed opinions and insights on this process can be improved. We would like to invite you to contribute to this effort by participating in an upcoming online survey, hosted by a trusted third party, Environics Research.

In the next few days, you will receive an email invitation from Environics asking you to take part in this important survey. Your participation in the survey is voluntary, however we encourage you to take part as the results of the survey will be used to improve the electoral return process and the products and services we provide to candidates and official agents in future federal elections. The survey will take approximately 15 minutes to complete. Your responses are completely confidential.

If you have questions about this survey or wish to confirm its authenticity, please contact Erik Lairot, Project Manager at erik.lairot@elections.ca, or you can call Elections Canada's toll-free number at 1-800-463-6868 from Monday to Friday, 9:00 a.m. to 5:00 p.m. Eastern time, to speak with an agent.

Thank you in advance for your support, and we look forward to your participation.

Tamara Kluge
Director, Political Financing and Audit

Follow-up e-mail broadcast with survey link

Subject: Survey of Official Agents

(le texte français suivra)

Dear [NAME],

As mentioned in our recent email, Elections Canada has contracted Environics Research to conduct a survey of the official agents of candidates in the general election of **October 21, 2019** about their experiences with the campaign electoral return process, during and/or following the election.

As an official agent, you are uniquely able to provide informed opinions and insights on how this process can be improved. The results of the survey will be used to improve the electoral return process and the products and services provided to candidates and official agents in future federal elections.

The survey will take 15 minutes to complete. Your participation in the survey is voluntary and your responses will be completely confidential.

Please click on the following link to complete the survey:

LINK

If you do not have time to complete the survey in one sitting, you can return to it by clicking again on the link above. Once the survey period closes on March 26, if you decide not to complete the entire questionnaire, your answers will not be retained.

If you have questions about this survey or wish to confirm its authenticity, please contact Erik Lairot, Project Manager at erik.lairot@elections.ca, or you can call Elections Canada's toll-free number at 1-800-463-6868 from Monday to Friday, 9:00 a.m. to 5:00 p.m. Eastern time, to speak with an agent.

This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website: www.canadianresearchinsightscouncil.ca/rvs/home/?lang=en and enter reference project code 20210225-EN037

Elections Canada — Official Agents

Online Questionnaire

SPLASH PAGE

Please select your preferred language for completing the survey. / Veuillez choisir la langue dans laquelle vous préférez répondre au sondage.

01 – English

02 – Français

Thank you for participating in this survey for official agents of candidates in the general election of October 21, 2019. Your input is important and your participation in this research is much appreciated.

This survey is being conducted on behalf of Elections Canada and the results will be used to guide decisions regarding communications products and services for the next federal election.

The survey should take no more than 15 minutes to complete, depending on your responses.

Your participation is voluntary and completely confidential. All your answers will remain anonymous and will be combined with responses from others. Any personal information collected is subject to the federal *Privacy Act* and will be held in strict confidence. By taking part in this survey, you consent to the use of your answers for research and statistical purposes. The anonymous database of all responses may be shared with external researchers under the strict condition that no personal information is ever distributed or made public.

If you wish to verify the legitimacy of this research or to register a complaint, please contact Erik Lairot, Elections Canada project manager, at erik.lairot@elections.ca, or you can call Election Canada's toll-free number at 1-800-463-6868 and speak to an Elections Canada agent from Monday to Friday, 9:00 a.m. to 5:00 p.m. Eastern time. To get information about the survey industry or to ask technical questions about this survey, please contact Brenda Sharpe at Environics at brenda.sharpe@environics.ca.

This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website www.canadianresearchinsightscouncil.ca/rvs/home/?lang=en and enter reference project code 20210225-EN037.

Please click on >> to continue.

[RED = SKIP/BRANCH/PROGRAMMING LOGIC]

Screening

1. Were you an official agent for a candidate who ran in the general election of **October 21, 2019**?
 - 01 Yes
 - 02 No **THANK AND TERMINATE**
 - 99 Not sure **THANK AND TERMINATE**

Information about official agents**Experience in role of official agent**

2. Was it your first time acting as an official agent for a candidate campaign?
- 01 Yes
 - 02 No
 - 99 Not sure
3. For how many candidates did you act as official agent in the October 2019 election?
- 01 One
 - 02 Two
 - 03 Three
 - 97 More than three (*please write in number*) _____

IF MORE THAN ONE CANDIDATE IN Q3 SHOW

In completing this survey, please think about your experiences in dealing with Elections Canada for the candidate with the ***most complex reporting requirements***.

ASK ALL

4. Did your candidate take part in a nomination contest prior to running as a candidate in the general election?
- 01 Yes
 - 02 No **SKIP TO Q6**
 - 99 Not sure **SKIP TO Q6**
5. Were you also the financial agent for the candidate's nomination campaign?
- 01 Yes
 - 02 No
 - 99 Not sure

Getting the campaign underway**Opening the bank account**

6. How **clear** was the obligation to open a bank account specifically for the candidate campaign?
- 01 Very clear
 - 02 Somewhat clear
 - 03 Not very clear
 - 04 Not at all clear
 - 99 Not sure

7. What, if any, aspects of opening a bank account specifically for the candidate campaign were difficult?

Select all that apply

RANDOMIZE 01-03

- 01 It was unclear what documentation was required to open the account
- 02 Obtaining the correct documentation was challenging
- 03 The bank was difficult to deal with
- 97 Other (Please specify) **DO NOT CODE – VERBATIMS TO BE REVIEWED**
- 98 No aspects were difficult **[SINGLE MENTION]**
- 99 Not sure **[SINGLE MENTION]**

Completing and Submitting the Electoral campaign return

Role

8. Were you the official agent at the time the electoral campaign return was prepared and submitted?

- 01 Yes
- 02 No **SKIP TO TEXT BEFORE Q23**
- 03 Not sure **SKIP TO TEXT BEFORE Q23**

Method Used to Submit the Electoral Campaign Return

9. Which method(s) did you use to submit the electoral campaign return?

Select all that apply

- 01 Political Entity Service Centre (PESC)
- 02 Email
- 03 Regular mail or courier services
- 04 Fax
- 05 Delivered in person by the official agent or candidate
- 99 Not sure **[SINGLE MENTION]**

Training

10. Did you attend training on how to complete and submit the return?

- 01 Yes
- 02 No
- 99 Not sure

Burden of Electoral Campaign Return

11. Overall, would you say that the process of **completing** (filling out) the electoral campaign return was...

- 01 Very easy
- 02 Somewhat easy
- 03 Somewhat difficult
- 04 Very difficult
- 99 Not sure

12. Overall, would you say that the process of **submitting** the electoral campaign return was...

- 01 Very easy
- 02 Somewhat easy
- 03 Somewhat difficult
- 04 Very difficult
- 99 Not sure

13. What, if any, aspects of completing and submitting the electoral campaign return were difficult?

Select any statements that apply

- 01 The instructions on how to complete the electoral campaign return were unclear
- 02 The form used to complete the electoral campaign return was too complex
- 03 The instructions on how to submit the electoral campaign return were unclear
- 04 The date by which to submit the electoral campaign return was unclear
- 05 The training provided on how to complete and submit the electoral campaign return needs improvement
- 97 Other **(Please specify) DO NOT CODE – VERBATIMS TO BE REVIEWED**
- 98 No aspects were difficult **[SINGLE MENTION]**
- 99 Not sure **[SINGLE MENTION]**

Electronic Financial Return (EFR)

14. Did you use the Electronic Financial Return (EFR) software to prepare the return?

- 01 Yes
- 02 No **SKIP TO Q20**
- 03 Not sure **SKIP TO Q21**

IF Q14 = 01 ASK Q15-19: To what extent do you agree or disagree with the following statements about using the Electronic Financial Return (EFR) software to prepare the return?

Please select one response for each statement

SET UP AS GRID

RANDOMIZE 15-19

15. The instructions provided by Elections Canada on how to find this software were clear
16. The EFR software was not easy to install
17. The EFR software was easy to navigate
18. The instructions on how to use the EFR software and provide the submission file were not clear
19. It was easier to file the financial return using the EFR software than with the manual process
 - 01 Strongly agree
 - 02 Agree
 - 03 Disagree
 - 04 Strongly disagree
 - 99 Not sure
20. **IF Q14 = 02:** Why did you not use the Electronic Financial Return (EFR) software to prepare the return?

Select any that apply

- 01 The User Guide for the EFR software was difficult to find
- 02 The instructions to install the EFR software were not clear
- 03 The EFR software could not be installed on my computer
- 04 The instructions on how to provide the EFR submission file were not clear
- 05 There was an error when I attempted to submit the final financial return file electronically
- 06 Prefer to prepare the financial return manually
- 97 Other (*Please specify*) **DO NOT CODE – VERBATIMS TO BE REVIEWED**

Ease of auditor's report

21. Was the candidate's campaign required to file an external auditor's report with the electoral campaign return?
 - 01 Yes
 - 02 No
 - 99 Not sure

22. How easy or difficult was it to figure out whether an auditor's report was required with the electoral campaign return?
- 01 Very easy
 - 02 Somewhat easy
 - 03 Somewhat difficult
 - 04 Very difficult
 - 99 Not sure

Elections Canada Products and Services

SHOW TO ALL: This next section asks for your opinion about some of the products and services Elections Canada makes available for candidate campaigns.

Did you use, or were you aware of, the following Elections Canada products and services?

Please choose one response for each resource

SET UP AS GRID

- 23. The Political Financing Handbook for Candidates and Official Agents
- 24. The Political Financing videos ("cartoons")
- 25. Electronic Financial Return (EFR) videos
- 26. Political Financing Newsletter
- 27. The Webex information session for official agents and candidates
- 28. The In-Classroom information sessions for official agents and candidates to start the campaign
- 29. The computer lab sessions for official agents and candidates to close the campaign
- 30. The Political Entities Support Network 1-800 #
- 31. Correspondence with Elections Canada (by email at political.financing@elections.ca or by mail)
 - 01 Yes, used it
 - 02 Aware of this resource but did not use it
 - 03 I was not aware of this resource
 - 99 Not sure

ASK Q32 IF ANY 01 AT Q23-31

32. Which, if any, of these products did you find **helpful**?

SHOW ANY PRODUCTS USED (01 AT 23-31)

Select any that apply

- 01 Political Financing Handbook for Candidates and Official Agents
- 02 Political Financing videos (“cartoons”)
- 03 Electronic Financial Return (EFR) videos
- 04 Political Financing Newsletter
- 05 Webex information sessions
- 06 In-Classroom information sessions
- 07 Computer lab sessions
- 08 The Political Entities Support Network 1-800 #
- 09 Correspondence with Elections Canada (by email at political.financing@elections.ca or by mail)
- 10 Another resource not listed was helpful (*Please specify*) **DO NOT CODE – VERBATIMS TO BE REVIEWED**
- 99 None were helpful **[SINGLE MENTION]**

33. What, if any, aspects of finding the products or services you were looking for on Elections Canada’s Political Financing website were difficult?

Select any statements that apply

- 01 The Political Financing website is hard to navigate
- 02 The products for Official Agents are not clearly presented
- 03 There is too much information on the Political Financing website
- 04 The links on the Political Financing website did not work
- 05 The training provided on how to complete and submit the electoral campaign return needs improvement
- 97 Other (*Please specify*) **DO NOT CODE – VERBATIMS TO BE REVIEWED**
- 98 There were no difficulties **[SINGLE MENTION]**

Political Entities Support Network (1-800 number)**[ASK Q34-39 IF Q30 = 01]**

To what extent do you agree or disagree with the following statements about the service you received from the EC 1-800 number for political entities:

Please select one response for each statement

- 34. The Elections Canada employee was courteous
- 35. The Elections Canada employee was knowledgeable
- 36. I was satisfied with the ease of access to the service.
- 37. I received a response in a timely manner
- 38. In the end, I got what I needed
 - 01 Strongly agree
 - 02 Agree
 - 03 Disagree
 - 04 Strongly disagree
 - 99 Not sure
- 39. When you contacted Elections Canada through the 1-800 number for political entities, approximately how long did you wait before speaking with an Elections Canada employee?

Please select one response

- 01 1-3 minutes
- 02 4-6 minutes
- 03 7-10 minutes
- 04 More than 10 minutes
- 05 Left a message for a call back
- 99 Not sure

Correspondence with Elections Canada (by email or mail)**[ASK Q40-43 IF Q31= 01]****SET UP AS GRID**

To what extent do you agree or disagree with the following statements about the service you received while corresponding by mail or email with Elections Canada:

Please select one response for each statement

- 40. The response was courteous
- 41. The response was informative
- 42. The response was timely
- 43. In the end, I received the information I needed
 - 01 Strongly agree
 - 02 Agree
 - 03 Disagree
 - 04 Strongly disagree
 - 99 Not sure

Other sources**ASK ALL**

- 44. Did you consult any sources **other** than Elections Canada to understand the financial and reporting provisions of the *Canada Elections Act* as they relate to candidates and how they applied in your situation?
 - 01 Yes
 - 02 No
 - 99 Not sure

[ASK Q45 IF Q44 = 01]

- 45. What sources did you consult?

Select any that apply

- 01 *Canada Elections Act*
- 02 Affiliated political party, if applicable
- 03 Affiliated electoral district association, if applicable
- 04 Other official agents
- 05 Media articles
- 06 Law firm
- 07 Accounting firm
- 97 Other (*Please specify*)

Product and Services Gaps**ASK ALL**

46. Are there any other products or services Elections Canada could have provided that would have made serving as an official agent easier for you?

[OPEN-ENDED]

- 98 Nothing else
99 Not sure

Elections Canada audit**ASK ALL**

47. Have you been contacted by Elections Canada for clarifications or additional information since the electoral return was filed?

- 01 Yes **ASK 48-55**
02 No **SKIP TO NEXT SECTION**
99 Not sure **SKIP TO NEXT SECTION**

48. How did Elections Canada contact you?

Select any that apply

- 01 Telephone call
02 Email
99 Not sure **[SINGLE MENTION]**

To what extent do you agree or disagree with the following statements about your interaction with Elections Canada **after** the return was filed:

Please select one response for each statement

SET UP AS GRID

49. The Elections Canada employee was courteous
 50. The Elections Canada employee was knowledgeable
 51. The Elections Canada employee clearly described the steps needed to complete the task
 52. The Elections Canada employee provided sufficient time to complete the task
 53. It was easy to submit the requested information
 54. The Elections Canada employee responded to my questions in a timely manner
 55. The Elections Canada employee followed up regularly after the initial contact until the task was complete
- 01 Strongly agree
 - 02 Agree
 - 03 Disagree
 - 04 Strongly disagree
 - 99 Not sure

Closing of the Campaign

SHOW TO ALL: This next section asks for your opinion of the steps for closing the campaign.

ASK ALL

For each of the following steps for closing the campaign, please indicate how easy or difficult it was to complete:

Please select one response for each step

56. Fulfilling all reporting obligations before closing the campaign
 57. Completing and submitting the statement of surplus
 58. Disposing of any surpluses
 59. Closing the campaign bank accounts
- 01 Very easy
 - 02 Somewhat easy
 - 03 Somewhat difficult
 - 04 Very difficult
 - 99 Not sure

DEMOGRAPHICS

SHOW TO ALL: Finally, here are some questions to help us analyze the results of this survey.

60. In which age category do you belong?

Select one only

- 01 18 to 24
- 02 25 to 34
- 03 35 to 44
- 04 45 to 54
- 05 55 to 64
- 06 65 to 74
- 07 75 or older

61. How do you identify your gender?

- 01 Female
- 02 Male
- 03 Other
- 99 Prefer not to say

62. What language do you speak **most often** at home?

MULTIPLE RESPONSE PERMITTED

- 01 English
- 02 French
- 03 Other

63. Which is the highest level of education that you have completed?

Select one only

- 01 Less than a high school diploma or equivalent
- 02 High school diploma or equivalent
- 03 Registered Apprenticeship or other trades certificate or diploma
- 04 College, CEGEP or other non-university certificate or diploma
- 05 University certificate or diploma below bachelor's level
- 06 Bachelor's degree
- 07 Postgraduate degree above bachelor's level
- 99 Prefer not to say

64. Which of the following categories best describes your current employment status? Are you:

Select one only

- 01 Working full-time, that is, 35 or more hours per week
- 02 Working part-time, that is, less than 35 hours per week
- 03 Self-employed
- 04 Unemployed, but looking for work
- 05 A student attending school full-time
- 06 Retired
- 07 Not in the workforce (full-time homemaker or unemployed but not looking for work)
- 08 Other
- 99 Prefer not to say

Other comments

65. Is there anything else not covered in this survey you would like to share about your experience as an official agent for the general election of October 21, 2019?

[OPEN-ENDED]

99 Nothing else

66. Would you be willing to be contacted by Elections Canada to provide feedback as Elections Canada develops new products and services for candidates and official agents?

- 01 Yes, I am willing to be contacted
- 02 No, I do not wish to be contacted

IF YES RECORD NAME AND EMAIL

Please provide your name and email so EC can contact you for your feedback. Your contact information will be provided to EC in a separate file and will **not** be linked to your survey responses.

Name _____

E-mail _____

This concludes the survey. This survey was conducted on behalf of Elections Canada. In the coming months the report will be available from Library and Archives Canada. We thank you very much for taking the time to participate and for your thoughtful feedback; it is greatly appreciated.

If you have any reason to believe your personal information is not being handled in accordance with the Privacy Act, you have a right to complain to the Privacy Commissioner of Canada.

Toll-free: 1-800-282-1376

TTY: (819) 994-6591

Web: Go to www.priv.gc.ca and click "Report a concern"

RECORD:

67. Type of device used to complete survey