



**Assessment of Service Canada's  
"Revenue Agency" Pilot Project**  
*Survey among citizens and interviews  
with staff*

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Highlights presented to  
Service Canada

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## Background, objectives and summary of methodology (survey)

### Background

- On September 14, 2005 the federal government launched Service Canada, a one-stop window where the citizen can obtain various government services, all under the same roof. For each service that it wants to offer, Service Canada (SC) has developed a service offer and is currently experimenting it my means of pilot projects. Consequently, SC wants to evaluate these projects in order to ensure proper delivery of the service to all citizens. Part of the information needed to evaluate the project will be obtained from citizens through telephone surveys. This pilot projects took place at various places in Quebec.

### Objectives

- The main objective of this survey is to measure the level of satisfaction of citizens who received services at the pilot sites.
- This report presents only the results for people who obtained services in one of the four Service Canada Centres experimenting, by means of a pilot project, the service offer of Canada Revenue Agency (CRA) (Lasalle, Verdun, Mauricie, Centre-du-Québec).

### Target population

- Citizens serviced by the « Canada Revenue Agency (CRA) » service offer.

### Sampling

- 18 respondents from the 138 citizens recruited responded to the survey.

### Collection

- Telephone surveys conducted between May 24 and June 7, 2006.
- Survey response rate: 13 %
- Response rate for the telephone interviews: 67 %

### Weighting

- No weighting was done.

### Maximum error margin

- 21,7% (at a confidence level of 95%)

## Objectives and summary of methodology (interviews)

### Objectives

- The main objective of the interviews with staff was to obtain their impression about the delivery of the service offer, including an evaluation of the quality of the documentation and tools available, of service modes, of impacts on their work and suggestions about good practices that could be implemented in view to a large scale roll-out of the offer.

### Recruiting

- The recruiting for the in-depth telephone interviews was done by SOM from May 25 to 30, 2006 using a list of contacts provided by Service Canada.

### Interviews

- Eleven telephone interviews with Service Canada staff, during between 30 and 45 minutes, were conducted from May 31 to June 8, 2006 by a SOM interviewer. The interviews were conducted in French and recorded with the respondent's authorization. They were subsequently transcribed. The interviews are broken down as follows:

- Agents d'aide à la clientèle (AAC): 8 interviews
- Consultantes, prestation de services (CPS) : 2 interviews
- Directrices, prestation de services (DPS) : 1 interview

# Highlights integrating the survey and the interviews with staff

## Aspects evaluated by citizens and staff

### Overall service provided to citizens

- Overall, all citizens declare themselves satisfied with the services they received. The wait time to meet a AAC, the time spent in order to obtain the services received, the politeness and competency of staff, the layout, and the coaching on the use of the service modes seem to constitute (on the basis of the limited information we have) the aspects with which citizens are the most satisfied, the proportion of dissatisfied respondents for these aspects being nil of low. Furthermore, almost all citizens consider that they were treated fairly and equally.

### Providing the CRA service offer

- All citizens polled received the services in the official language of their choice, and most were offered to use the Internet or telephone service mode. In spite of this, only half of the citizens used either one of these service modes. More than half of them were coached on these uses, all satisfactorily. However, citizens learned relatively little by using the service modes. Indeed, very few citizens feel that they learned a great deal. Nevertheless, most citizens are planning on using one of the service modes autonomously in the future. Furthermore, half of the citizens were told about the E-pass.
- Almost all citizens feel they received a service that goes beyond what they asked for, and all feel important to be given service that exceeds the request made (which is what the offer is supposed to do). Furthermore, the general information about Government of Canada programs and services is not always provided. Here as well, most citizens consider useful to receive this type of information.
- The AACs feel somewhat uncomfortable with providing the service offer to citizens, something which they attribute to factors such as training, personal capabilities, the implementation of the offer and the citizens themselves.
- According to staff, the problems related to the dedicated phone line have to do mostly with the offer's implementation (e.g. the fact that certain CRA representatives do not want AACs to act as intermediates). As for the website, the offer's implementation also explains certain problems, as does the citizens' lack of preparation (e.g. their lack of knowledge about income tax matters).

## Privacy and layout

- Almost all citizens polled feel that their personal information was protected by Service Canada staff and that the layout is appropriate with respect to protecting personal information. However, some are concerned about the booths not being sufficiently enclosed or about having to give their social insurance number orally. The staff also considers that open office space is less appropriate with respect to privacy and would like to have partitions and closed offices. The signs and movement do not pose any problems, neither for citizens nor staff.

## Aspects evaluated by staff only

### Human resources

- For the staff, the introduction of the CRA service offer impacts their work both in a positive way (more diverse tasks, broader knowledge) and in a negative way (extra workload due to insufficient resources). Furthermore, the staff expresses a feeling of involvement in the offer's implementation, because the subject matter (income tax) is directly relevant to them and they are meeting the needs of citizens at the same time.

### Operations and processes

- The local follow-up mechanisms seem adequate. However, concerning supervision by the region, staff would like more frequent support visits and more direct observation of the AACs' work. The tracking requested by the region, which involved manually compiling certain data, was tedious in certain cases.
- Integrating the CRA service offer to the other existing offers does not pose any problem according to staff.

### Exportability of the pilot project

- Here are some of the main suggestions or practices to consider according to staff with a view to a potential roll-out of the offer:
  - Make the service known to the public.
  - Provide access to an income tax specialist through the dedicated phone line.
  - Have a resource person from the department on site.
  - During training, allow time for team discussion. Also provide subsequent training.
  - Review the layout in order to improve privacy.

# Conclusions

## About the services provided to citizens:

### **Citizens satisfied with the services**

- Overall, all citizens polled declare themselves satisfied or very satisfied with the services they received, which is a very good result. More specifically, whether in regards to the wait time before meeting a AAC, the time spent in order to obtain the services received, the politeness and courtesy of staff, or the coaching on the use of the service modes, all citizens polled declare themselves satisfied. In fact, the only dissatisfactions voiced have to do with parking and in one case, a citizen's file that was allegedly lost.
- Concerning the actual basis of the service offer, it is worth noting that all citizens received the services in the official language of their choice, that most were offered to use the Internet or the telephone service, and that almost all feel they received service that goes beyond what they asked for. Furthermore, the general information about Government of Canada programs and services is not always provided. It may be necessary to make some adjustments here, since it is an integral part of the service offer.

### **But AACs sometimes uncomfortable with the service they provide**

- AACs on their part expressed a certain discomfort about their role, despite the obvious satisfaction of the citizens polled. There are various reasons for this discomfort, as we have emphasized in the preceding pages. Some, such as those related to the citizens' expectations, behaviours and capabilities, cannot be changed easily. However, special attention could be brought to those having to do with the lack of training (e.g. insufficient knowledge of the programs, lack of familiarity with the tools, and lack of knowledge on how to browse through the site) or the implementation of the offer (e.g. stress caused by the perceived shortage of staff). In fact, from the viewpoint of a large scale roll-out of the offer, it would be desirable that arrangements be put in place so that AACs can enjoy a certain comfort in their new duties.

## Conclusions - cont'd

### About the layout and privacy:

#### **Open office space is not appropriate with respect to protecting personal information**

- Despite the fact that almost all citizens polled feel that the layout is appropriate, this is nevertheless a problem, as raised by the staff. Indeed, open office space, the possibility of reading computer screens, and the proximity of clients in the waiting area are hindering privacy. The suggestions put forward to address this problem include closed offices, partitioned booths in a secure area, and putting the telephones further away.

### About the service modes:

#### **Usually offered, but rarely used**

- The offer to use the Internet or telephone service was made to most citizens polled, which is encouraging since this forms the very basis of the service offer. Those who were coached on using the service appear satisfied, so there is no problem in this respect. However, two things hold our attention. First, only half of citizens actually used either one of the service modes. For the time being, we do not have sufficient information to explain this finding. Also, those few citizens (only eight) who used the services indicated having learned little or somewhat. We therefore note shortcomings with this aspect.

### About the internal aspects of the service offer's implementation:

#### **Regional supervision could use a few adjustments**

- As we have seen, the local follow-up mechanisms, which consist mainly in meetings, are considered adequate and essential. These aspects should therefore be retained. With regard to supervision by the region however, more support visits and more direct observation of the AACs work is desired. Conference calls are also appreciated and should therefore be kept. Finally, the presence of an agent from the Canada Revenue Agency on site would be appreciated in order to help the AACs with their work.