

# ***Survey of Official Agents following the 44<sup>th</sup> General Election***

## **Final Report**

### **Prepared for Elections Canada**

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**Ce rapport est aussi disponible en Français**

## **Survey of Official Agents following the 44th General Election Final Report**

Prepared for Elections Canada by Environics Research Group.

Delivery Date: April 26, 2023

This public opinion research report presents the results of an online survey conducted by Environics Research Group from February 16-March 26, 2023.

Cette publication est aussi disponible en français sous le titre *Sondage auprès des agents officiels à la suite de la 44e élection générale – Rapport final*.

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## Executive summary

### Background and objectives

Elections Canada (EC) commissioned Environics Research to conduct a survey of Official Agents (OAs) following the 44<sup>th</sup> federal General Election (GE) that was held on September 20, 2021.

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 aimed to assess official agents' views and experiences of the election and with Elections Canada with regards to fulfilling the financial reporting obligations of the candidate campaign in order to identify areas for improvement. 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 February 16 to March 26, 2023. From a list of 1,486 unduplicated emails of OAs provided by Elections Canada, a total of 548 Official Agents completed an online interview, for a participation rate of 37%. The participating respondents had the following regional distribution:

Breakdown/Location	Total	Atlantic	Quebec	Ontario	MB/SK	Alberta	BC/Terr
Number of completed interviews	548	54	101	217	42	55	79
% of completed interviews	100%	10%	18%	40%	8%	10%	14%
Number of OA unduplicated contacts	1,486	130	331	553	110	160	202
% of total OA contacts	100%	9%	22%	37%	7%	11%	14%

This was an attempted census of the Official Agent population, and as such, there is no margin of sampling error for this study.

### Contract value

The contract value was \$68,478.00 (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 an 18-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 20 months prior and thus recall may be an issue for some.

**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

- Six in ten (59%) OAs in the survey were first time agents, somewhat fewer than in the 43<sup>rd</sup> GE (68%).
- Almost all OAs (94%) supported a single candidate in the 44<sup>th</sup> GE.

### B. Getting the campaign underway

- Eight in ten OAs (80%) 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

- Virtually all OAs (99%) were the official agent at the time the campaign return was submitted.
- About three-quarters (73%) submitted the electoral campaign return via the Political Entity Service Centre (PESC).
- Just over four in ten (44%) attended training regarding the electoral return, which is comparable to the percentage of OAs in the 43<sup>rd</sup> GE survey. Lack of awareness about the training and the timing not being convenient are the top reasons for not attending the training, with a higher percentage among first time OAs.
- Just under six in ten (55%) agree to some extent the campaign return was easy to complete, and six in ten (61%) say it was easy to submit.

- The most difficult aspects of dealing with the campaign return are the complexity of the form itself and the lack of clarity in the instructions for completing and submitting the form.

#### **D. Electronic Financial Return (EFR)**

- Just under nine in ten OAs (88%) used the EFR software to prepare the campaign return.
- Official agents who used the EFR software for their campaign return generally agree that the EFR software is accessible (77%), that the instructions on how to find the EFR software were clear (77%), and that it was easier to use the EFR software to file than the manual process (72%).
- Among the few who did not use the EFR software, this was mostly because the software could not be installed on their computer (30%), they preferred to prepare it manually (30%), or because they received help from a third party (accounting firm/auditor) to prepare the campaign return (21%).

#### **E. Political Entities Service Center (PESC)**

- Three-quarters (75%) of OAs used the PESC portal to upload and submit the candidate campaign return.
- Among the 25% of OAs who did not use the PESC, the top reasons for not using it are a preference for other ways to submit the campaign return (34%) and not being able to figure out how to use the portal to submit documents (22%).
- Seven in ten (70%) OAs who used the PESC portal report it was at least somewhat easy to use, with under one in five (17%) saying it was very easy.
- Under half (42%) of PESC portal users say they required support. Among these, over half (53%) needed help uploading documents, while just under three in ten (28%) needed assistance to apply digital consent.
- Seven in ten (70%) who needed assistance with PESC say it was at least somewhat easy to get the help they needed.

#### **F. Elections Canada products and services**

- Out of eight products and services that EC makes available to OAs, OAs most often reported using the Political Financing Handbook (87%), having correspondence with Elections Canada (73%) and the 1-800 number for the Political Entities Support Network (51%).
- The Political Financing Handbook, 1-800 number and having correspondence with EC are also the resources deemed helpful by the highest proportions of their users. The videos are considered the least helpful resources, but still, at least half of their users say they were helpful.
- The main difficulties OAs had with finding or using Political Financing products and services available on the Elections Canada website were navigating the Elections Canada website (38%) and using the EFR software or PESC portal (31%). Other OAs feel that the products are not easy to

find on the website (26%) and that the training on how to deal with the return could use improvement (24%).

- Among OAs who used the Political Entities Support Network, nine in ten agree to at least some extent with various positive statements about their experience. Most notably, seven in ten strongly agree that the EC employee they dealt with was courteous (72%) and that they were able to converse in their official language (71%).
- Similarly, among OAs who corresponded with EC by mail or email, nine in ten agree to some extent with various other positive statements about their contact with EC. Most notably, majorities strongly agree that the response they received by mail or email was courteous (57%) and that it was informative (50%).
- Around one-quarter of OAs for the 44<sup>th</sup> GE (23%) say they experienced difficulties with accessibility when using or interacting with EC products or services, although they appear to be interpreting “accessibility” broadly, as they refer to problems uploading files or difficulties with locating needed materials or logging in.
- As in the 43<sup>rd</sup> GE survey, the top product and service needs identified continue to be more flexible training options, software updates to make it function better and/or be compatible with all operating systems, and a simplified reporting process/elimination of duplication.

#### **G. Elections Canada audit**

- About six in ten (62%) OAs were contacted by EC after filing the campaign return, comparable with the 43<sup>rd</sup> GE, with almost all (96%) receiving an email.
- At least three-quarters of those contacted by EC agree to some extent with positive statements about their interactions with EC after their campaign return was submitted. OAs most often agreed that the EC employee was courteous (96%), and least often agreed that they gave clear information about required next steps (76%).

#### **H. Closing of the campaign and other comments**

- As was the case in the survey after the 43<sup>rd</sup> GE, the easiest aspects of closing the campaign are closing the bank account and disposing of any surplus.
- OAs suggested a number of improvements for EC to consider: these included improvements to the EFR software and PESC; simplifying the overall process, especially for smaller campaigns; and recognition that OAs are volunteers, for example, by allowing more flexibility with deadlines, longer turnaround times to fulfill requests, etc.

## 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 survey of Official Agents following the 44<sup>th</sup> federal General Election held on September 20, 2021. This survey aimed to assess official agents' views and experiences with the 44<sup>th</sup> 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. Experience serving as an OA

*Six in ten OAs in the survey were first time agents.*

Six in ten (59%) Official Agents for the 44<sup>th</sup> General Election were acting in that capacity for the first time, fewer than in the 43<sup>rd</sup> GE (68%).

#### First time agent

<b>Q2</b> Was it your first time acting as an official agent for a candidate campaign?	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
Yes	59%	68%
No	41%	32%

Across the country, being a first-time agent ranges from a low of 40 percent in Manitoba/Saskatchewan up to 65 percent in Ontario and the Atlantic region. As in the previous election there is variation by age, with those under age 35 being the most likely to be first time agents (88%), and those age 55 and over being the least likely (52%).

Those who were OAs for one candidate (61%, vs. 27% who acted for more than one) are more likely to be first time agents.

#### 2. Number of candidates supported

*The vast majority of OAs supported a single candidate.*

Over nine in ten OAs acted on behalf of one candidate for the 44<sup>th</sup> GE, similar to the 43<sup>rd</sup> GE (93%).

#### Number of candidates

<b>Q3</b> For how many candidates did you act as official agent in the September 2021 election?	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
One	94%	93%
Two	2%	5%
Three	1%	<1%
More than three	3%	2%

Across the country, the proportions of OA who supported single candidate range from 87 percent in Quebec to 97 percent in Ontario. The percentage is higher among first time OAs (97% vs. 89% who had served as an agent before).

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

## B. Getting the campaign underway

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

*Eight in ten OAs say the obligation to open a campaign account was very clear.*

Over nine in ten (94%) OAs say the obligation to open a candidate campaign-specific bank account was at least somewhat clear, including eight in ten (80%) who say it was very clear, both higher than for the 43<sup>rd</sup> GE.

#### Requirement to open a campaign bank account was clear

<b>Q6</b> <i>How clear was the obligation to open a bank account specifically for the candidate campaign?</i>	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
<b>Net: Clear</b>	<b>94%</b>	<b>90%</b>
Very clear	80%	73%
Somewhat clear	14%	18%
<b>Net: Unclear</b>	<b>5%</b>	<b>8%</b>
Not very clear	3%	4%
Not at all clear	2%	4%
<b>Not sure</b>	<b>1%</b>	<b>1%</b>

High proportions across all subgroups say this requirement was at least somewhat clear. Saying it was *very clear* is notably higher among the following:

- Those who acted as an OA before (88%).
- Those who acted for more than one candidate (91%, vs. 80% who acted for only one).

## 2. Difficult aspects of opening a campaign bank account

*The most difficult aspects of opening a campaign account continue to be dealing with the bank and sorting out the required documentation.*

As was the case for OAs in the 43<sup>rd</sup> GE, over half describe some kind of difficulty with opening the campaign account. The most common problems include the bank being difficult to deal with (30%), that it was unclear what documentation was required (22%), or that obtaining the needed documentation was challenging (13%). Fewer than one in ten mention other issues, such as the bank staff not being prepared, or OAs themselves having a lack of information on how to proceed. Over four in ten (44%) say there were no difficult aspects to opening the campaign account. These results are very consistent with those from the previous survey.

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

Q7 <i>What, if any, aspects of opening a bank account specifically for the candidate campaign were difficult?</i>	Total 44 <sup>th</sup> GE	Total 43 <sup>rd</sup> GE
The bank was difficult to deal with	30%	27%
Unclear what documentation was required	22%	19%
Obtaining the correct documentation was challenging	13%	12%
Bank/staff not prepared/needed more info on process/paperwork	5%	6%
Process/completing paperwork was difficult/challenging/took time	4%	1%
Lacked info on how to proceed (when to open/type of account etc.)	3%	4%
Issues with naming the account	2%	2%
Unable to schedule appointments with the bank	1%	0%
We didn't open an account/ran \$0 campaign	<1%	1%
Unable to open/access account electronically	<1%	1%
Other	1%	2%
No aspects were difficult	44%	44%
Not sure	1%	3%

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

- There were fewer mentions of the *bank being difficult to deal with* in Manitoba/Saskatchewan (19%) and the Atlantic region (15%) than in other parts of Canada (29% to 39%), and, by age, the most mentions were among those under age 35 (44%), and decreasing to lowest among those aged 55 and over (25%).
- There were more mentions that *it was unclear what documentation was required to open the account* among those under age 35 (34%) and among first-time OAs (26%).

## C. Completing and submitting the electoral campaign return

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

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

Virtually all responding OAs were in the position at the time the campaign return was prepared and submitted. This is the case across all subgroups of the population.

#### Was official agent at time the electoral campaign return was prepared and submitted

<b>Q8</b> <i>Were you the official agent at the time the electoral campaign return was prepared and submitted?</i>	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
Yes	99%	97%
No	<1%	2%
Not sure	1%	1%

### 2. How electoral campaign return was submitted

*Close to three-quarters submitted the electoral campaign return via the Political Entities Service Centre (PESC).*

Out of five possible methods for delivering the electoral campaign return for the 44<sup>th</sup> GE, almost three-quarters (73%) used the Political Entity Service Centre (PESC), up from 62% for the 43<sup>rd</sup> GE. One-quarter (27%) used email (comparable to 43<sup>rd</sup> GE). Fewer report having used regular mail/courier for at least some portion of the delivery (13%, down from 27%). As in the previous survey, only very small minorities used in-person delivery or a fax.

#### Method(s) used to submit electoral campaign return

*Note: multiple responses were permitted*

*Subgroup: Was OA when return was filed*

<b>Q9</b> <i>Which method(s) did you use to submit the electoral campaign return?</i>	<b>44<sup>th</sup> GE (n=542)</b>	<b>43<sup>rd</sup> GE (n=589)</b>
Political Entity Service Centre (PESC)	73%	62%
Email	27%	27%
Regular mail or courier services	13%	27%
Delivered in person by the official agent or candidate	2%	3%
Fax	<1%	<1%
Not sure	4%	5%

PESC is the most-used submission method across the country and all subgroups. Use of PESC is somewhat higher among those who attended training regarding the return (82%, vs. 66% who did not attend).

### 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. Reasons for not attending come down to not knowing the training was available or the timing of the training being inconvenient.*

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 (44%), but a majority did not (52%). These results are similar to those of the survey following the 43<sup>rd</sup> GE.

#### Attended training on how to complete and submit the electoral return Subgroup: Was OA when return was filed

<b>Q10 Did you attend training on how to complete and submit the return?</b>	<b>44<sup>th</sup> GE (n=542)</b>	<b>43<sup>rd</sup> GE (n=589)</b>
Yes	44%	43%
No	52%	54%
Not sure	4%	3%

Attendance of this training among respondents ranges from a low of 33 percent in B.C. to a high of 54 percent in Quebec and Alberta. Attendance is notably higher among first-time OAs (51% vs 35% who were an OA in a previous election).

In a new question in this survey, those who did not attend training on the campaign return were asked why they did not. Five potential reasons were provided as a randomized list. The top reason, selected by three in ten (29%), was not being aware of the training available, followed by the timing not being convenient (20%). One in ten (11%) were not sure how to access training, and fewer indicate other reasons. Subgroup sizes are too small for deeper analysis.

#### Reasons for not attending training on how to complete and submit the electoral return *Note: multiple responses were permitted* Subgroup: Was OA when return was filed and did not attend electoral return training

<b>Q10B Why did you not attend or access the training on how to complete and submit the return?</b>	<b>44<sup>th</sup> GE (n=280)</b>
I was not aware of what was available	29%
The timing of the sessions was not convenient	20%
I did not know how to access it	11%
Did not find the information useful	7%
Do not like the online format for training	6%
Other (not specified)	38%
Not sure	6%

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

*Over half of OAs felt it was at least somewhat easy to complete the return, and six in ten say it was at least somewhat easy to submit it.*

Official agents were asked to indicate how easy or difficult they found the process of completing the return and of submitting the return. Over half (55%) feel completing the return was at least somewhat easy, higher than it was for the 43<sup>rd</sup> GE (47%), although still fewer than one in ten (7%) thought it was very easy. Conversely, over four in ten (44%) say it was at least somewhat difficult, including more than one in ten who thought it was very easy (12%).

Six in ten (61%) found the process of *submitting* the return to be at least somewhat easy, and just under four in ten found (38%) it difficult to some extent. These results are slightly improved compared with the survey following the previous election.

**If process of completing or submitting the electoral campaign return was easy or difficult  
Subgroup: Was OA when return was filed**

<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	
	44 <sup>th</sup> GE (n=542)	43 <sup>rd</sup> GE (n=589)	44 <sup>th</sup> GE (n=542)	43 <sup>rd</sup> GE (n=589)
<b>Net: easy</b>	<b>55%</b>	<b>47%</b>	<b>61%</b>	<b>56%</b>
Very easy	7%	6%	17%	14%
Somewhat easy	48%	41%	44%	41%
<b>Net: difficult</b>	<b>44%</b>	<b>51%</b>	<b>38%</b>	<b>42%</b>
Somewhat difficult	32%	36%	29%	27%
Very difficult	12%	15%	9%	15%
<b>Not sure</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>2%</b>

The proportions who say the process of *completing* the return was at least somewhat easy were similar across the country and most subgroups of the OA population. The following groups more often said it was easy:

- Experienced OAs (67%, vs. 46% of first-time OAs).
- Those acting for more than one candidate (73%, vs. 54% working with just one).

The proportions who say the process of *submitting* the return was easy were also generally similar across the country (55% to 66%), although highest in Alberta (72%). The following groups more often said it was easy:

- Experienced OAs (71%, vs. 53% of first-time OAs).
- Those acting for more than one candidate (76%, vs. 60% working with just one).
- Those who filed using PESC (64%, vs. 54% who submitted by email and 46% by postal mail or courier).

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

*The most difficult aspects of dealing with the campaign return continue to be the complexity of the form itself, and lack of clarity in the instructions on how to complete and submit it.*

OAs were asked to indicate what aspects of completing and submitting the campaign return were difficult, if any. Five potential options were provided (shown with asterisks in the table below), and respondents could write in additional issues. One in four (24%) indicate no aspects were difficult.

Among the aspects identified, OAs most often said the form was too complex (29%), or that the instructions for completing (26%) or submitting (21%) the return were unclear. Two in ten (19%) indicate the training on how to complete the return needs improvement. Under one in ten mention other issues, with the highest unprompted difficulty being software-related issues, including the EFR being outdated or the website not being user friendly (8%).

### Difficult aspects of completing and submitting the electoral campaign return

*Note: multiple responses were permitted*

*Subgroup: Was OA when return was filed*

<b>Q13 What, if any, aspects of completing and submitting the electoral campaign return were difficult?</b>	<b>44<sup>th</sup> GE (n=542)</b>	<b>43<sup>rd</sup> GE (n=589)</b>
Form used to complete the return was too complex*	29%	29%
Instructions on how to complete the return were unclear*	26%	31%
Instructions on how to submit the return were unclear*	21%	31%
Training provided on how to complete submit return needs improvement*	19%	25%
Software issues/EFR outdated/website not user friendly	8%	10%
Date by which to submit the return was unclear*	5%	6%
Difficulties in uploading/submitting forms/ended up mailing them	5%	4%
Incompatible with Mac	4%	3%
Process difficult to manage/cumbersome/requirements hard to meet	4%	4%
Too time consuming/tedious to complete/too much work	3%	3%
Too many confusing categories to charge an expense to	3%	-
The auditor did it for me/helped	3%	-
Other mentions (1% or less each)	8%	9%
No aspects were difficult	24%	19%
Not sure	3%	5%

\* These options were shown to respondents

Results are generally consistent with the previous survey.



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

- *The form used to complete the electoral campaign return was too complex:* mentioned more often by first time OAs (34% vs. 22% of others), those with only one candidate (30% vs. 15% with two or more) and those who attended training on the return (33%, vs. 25% who did not).
- *The instructions on how to complete the electoral campaign return were unclear:* mentioned more often by first time OAs (31% vs. 18% of others).
- *The training provided on how to complete and submit the electoral campaign return needs improvement:* mentioned more often by first time OAs (25% vs. 11% of others), those with only one candidate (20% vs 9% with two or more) and those who attended training on the return (26%, vs. 13%).

## D. Electronic Financial Return (EFR)

### 1. Using the EFR software to prepare the return

*About nine in ten OAs used the EFR software to prepare the campaign return.*

Just under nine in ten (88%) OAs used the Electronic Financial Return (EFR) software to complete their campaign return, one in ten (9%) did not and four percent could not recall.

**If OAs used the EFR software to prepare the return  
Subgroup: Was OA when return was filed**

<b>Q14 Did you use the Electronic Financial Return (EFR) software to prepare the return?</b>	<b>44<sup>th</sup> GE (n=542)</b>	<b>43<sup>rd</sup> GE (n=589)</b>
Yes	88%	89%
No	9%	8%
Not sure	4%	3%

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

- Experienced OAs (94%, vs. 84% of first-time OAs).
- OAs who attended training about the return (92%, vs. 84% who did not attend).
- Those who filed using the PESC (94%).
- Those who found completing the return easy (92%, vs 84% who found it difficult).

## 2. Agreement with statements about using the EFR software

*Official agents are most likely to agree to some extent the EFR software is accessible, that the instructions on how to find the EFR software were clear, and that it was easier to file the return using EFR than the manual process.*

OAs who used EFR for campaign return were asked to indicate their level of agreement with six statements about working with the EFR. Two-thirds or more agree with the four positive statements presented: that the EFR software is accessible (77% net agree), that the instructions on how to locate the software were clear (77%), that it was easier to file the financial return this way as opposed to the manual process (72%), and that the software was easy to navigate (66%).

The remaining two statements were negative, meaning OAs who agreed were offering a negative assessment. However, three-quarters (73%) of OAs disagreed to some extent with the statement that the software was not easy to install (28% strongly disagreed) and just over half (52%) disagreed that the instructions on how to use the software and provide the submission file were not clear (12% strongly).

### Method(s) used to submit electoral campaign return Subgroup: Those who used the EFR for the campaign return (n=476)

<b>Q15-19x To what extent do you agree or disagree with the following statements about using the Electronic Financial Return (EFR) software to prepare the return?</b>	<b>Net agree (very + somewhat)</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>43<sup>rd</sup> GE Net agree (very + somewhat)</b>
The EFR software is accessible	77%	23%	54%	10%	7%	n/a
Instructions provided by EC on how to find this software were clear	77%	19%	58%	14%	5%	76%
It was easier to file the financial return using the EFR software than with the manual process	72%	34%	39%	6%	4%	60%
EFR software was easy to navigate	66%	15%	50%	19%	13%	65%
Instructions on how to use EFR software and provide the submission file were not clear	43%	11%	33%	40%	12%	49%
EFR software was not easy to install	24%	8%	16%	45%	28%	29%

As in the previous survey for OAs in the 43<sup>rd</sup> GE, overall agreement with these statements is generally similar across the country and most subgroups, with some exceptions. As before, 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 EFR software is accessible:* Experienced OAs (81%, vs. 73% of first time OAs).
- *The instructions provided by Elections Canada on how to find this software were clear:* Age 55 and over (81%).
- *The EFR software was easy to navigate:* Experienced OAs (72%, vs. 61% of first time OAs); age 55 and over (70%).
- *It was easier to file the financial return using the EFR software than with the manual process:* OAs in Atlantic Canada (86%), experienced OAs (81%, vs. 65% of first time OAs).
- *The instructions on how to use the EFR software and provide the submission file were not clear:* First-time OAs (48%, vs. 37% with more experience), Quebec OAs (54%, vs. 27% to 46% of others), OAs who completed the survey in French (55%, vs. 41% of English respondents).

### 3. Why EFR was not used to prepare the return

*OAs who did not use the EFR software mostly indicate the software could not be installed on their computer or that they preferred to prepare it manually.*

The small number of OAs who did not use the EFR to file the campaign return (n=47) were asked why not. They were given six potential reasons (marked with an asterisk in the table below) and allowed to specify others as needed.

The main reasons for not using EFR are technical issues preventing installation of the software (30%), or preferring to prepare the return manually (30%). Two in ten (21%) volunteered that an accounting firm or auditor helped with the return as the reason for not using the EFR, more mentions than in the previous survey. 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*

**Subgroup: Those who did not use EFR to prepare the return**

<b>Q20 Why did you not use the Electronic Financial Return (EFR) software to prepare the return?</b>	<b>44<sup>th</sup> GE (n=47<sup>**</sup>)</b>	<b>43<sup>rd</sup> GE (n=47<sup>**</sup>)</b>
EFR software could not be installed on my computer*	30%	28%
Prefer to prepare the financial return manually*	30%	38%
Accounting firm/auditor helped with it	21%	<1%
Instructions to install the EFR software were not clear*	15%	19%
User Guide for the EFR software was difficult to find*	13%	13%
There was an error when I attempted to submit the final financial return file electronically*	6%	6%
Other	11%	30%

\* These options were shown to respondents

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

A small number of OAs made other comments: some mention having no expenses/donations or not being aware of it; one person felt proprietary software was unethical to use for this purpose.

## E. Political Entities Service Centre (PESC)

### 1. Use of Political Entities Service Centre (PESC)

*Three-quarter of OAs used the PESC portal to upload and submit the candidate campaign return; those who did not most often preferred other methods or were not able to figure out how to use the portal.*

In a new section in this version of the survey, OAs were given the following preamble:

*The Political Entities Service Centre (PESC) is a tool that allows you to access electoral products and services and to upload and submit financial returns.*

They were then asked if they used the PESC portal to upload and submit the candidate campaign return. Three-quarters used it.

#### Use of PESC

<b>PE01</b> <i>The Political Entities Service Centre (PESC) is a tool that allows you to access electoral products and services and to upload and submit financial returns. Did you use the Political Entities Service Centre (PESC portal) to upload and submit the candidate campaign return?</i>	<b>Total 44th GE (n=548)</b>
Yes	75%
No	18%
Not sure	6%

Use of the PESC portal is similar across the country (ranging from 69% of OAs in Quebec to 83% in the Atlantic) and majorities of all subgroups used it. Use is higher among those who attended training about the campaign return (82%, vs. 70% who did not attend).

The OAs who did not use the PESC to submit campaign documents (n=100) were asked why not. They were given four potential reasons (marked with an asterisk in the table below) and allowed to specify others as needed. The top reasons for not using the PESC are a preference for other ways of submitting the forms (34%) and not being able to figure out how to use it to submit the return (22%). Around one in six were not able to figure out how to log in (18%), or were not aware for what purpose the portal could be used.

Subgroups sizes are too small for further analysis.

#### Why PESC was not used

*Note: multiple responses were permitted*

**Subgroup: Those who did not use the PESC**

<b>PE02</b> Why did you not use the Political Entities Service Centre (PESC portal) to submit the campaign return or any other document?	Those not using the PESC (n=100)
Preferred to submit it another way*	34%
Was not able to figure out how to submit*	22%
Was not able to figure out how to log in*	18%
Was not aware of what to use the PESC portal for*	16%
Auditor did it for me	10%
Completed forms by hand	6%
Problem with uploading forms	3%
I use a MacBook	2%
Other	2%
Not sure	5%

\* These options were shown to respondents

### 3. Ease of using the Political Entities Service Centre

#### *Seven in ten OAs who used the PESC portal felt it was at least somewhat easy to use*

Those who used the PESC portal were asked how easy or difficult it was to use to submit the campaign return and other documents: Seven in ten (70%) report it being at least somewhat easy, with under one in five (17%) saying it was very easy. Three in ten (29%) say it was difficult to some extent.

#### *If process of using the PESC portal was easy or difficult*

<i>PE03 How easy or difficult was it to use the PESC portal to submit the campaign return and other documents</i>	<i>Those using the PESC (n=413)</i>
<b>Net: easy</b>	<b>70%</b>
Very easy	17%
Somewhat easy	53%
<b>Net: difficult</b>	<b>29%</b>
Somewhat difficult	23%
Very difficult	7%
<b>Not sure</b>	<b>1%</b>

Across the country, at least majorities of OAs who used the PESC portal thought it was at least somewhat easy to use, ranging from 50 percent in Manitoba/Saskatchewan up to 85 percent in Alberta. This response was more frequent among the following:

- OAs with a university degree (73%).
- Experienced OAs (76%, vs. 66% of first time OAs).

### 4. Needing support to file the campaign return using PESC

#### *Just over four in ten required support to use the PESC portal to file the campaign return*

Users of the PESC were asked if they required support to use it to file the return. Just over half (55%) did not need support, while about four in ten did (42%).

#### *If support was required to upload and submit the campaign return using PESC*

<i>PE04 Did you require support to upload and submit your campaign return?</i>	<i>Those using the PESC (n=413)</i>
Yes	42%
No	55%
Not sure	3%

Requiring support to file the return via the PESC portal is more frequent among the following:

- First-time OAs (50%, vs. 31% who have been an OA before).
- Those who attended training about the campaign return (47%, vs. 38% who did not).
- Those who had difficulties with the report in terms of completion (59%, vs. 28%) or submission (61%, vs. 31%).

The OAs who required support with the PESC (n=173) were asked what errors or difficulties they encountered. They were shown six potential issues. The top issues leading to a request for PESC support are requiring help to upload documents (53%) and needing help to apply digital consent (28%). Around one in ten each indicate their account link did not work (12%), not being able to remember or reset a passphrase (11%), or not knowing how to switch entities (10%).

#### Why PESC support was required

*Note: multiple responses were permitted*

**Subgroup: Those who required PESC support**

<b>PE05</b> <i>What errors or difficulties did you encounter with PESC that required support?</i>	<i>Those requiring PESC support (n=173)</i>
I needed help to upload my documents	53%
I needed help applying digital consent	28%
The link I got to set up my account did not work	12%
I could not remember my passphrase or reset it online	11%
I did not know how to switch entities	10%
I could not find the candidate I wanted to upload and submit for	5%
Other (not specified)	27%
Not sure	13%



## 6. Ease of getting support for using the Political Entities Service Centre

*A seven in ten majority say it was at least somewhat easy to get PESC support*

Seven in ten (70%) OAs who used PESC support say it was at least somewhat easy to obtain, around one-quarter (27%) say it was at least somewhat difficult. Across all subgroups, at least a majority said it was at least somewhat easy to obtain the support they needed with the PESC portal.

*If obtaining support with the PESC portal was easy or difficult*

<i>PE06 How easy or difficult was it to obtain support to upload and submit your return?</i>	<i>Those requiring PESC support (n=173)</i>
<b>Net: easy</b>	<b>70%</b>
Very easy	26%
Somewhat easy	44%
<b>Net: difficult</b>	<b>27%</b>
Somewhat difficult	21%
Very difficult	5%
<b>Not sure</b>	<b>3%</b>

## F. Elections Canada products and services

### 1. Awareness and use of EC products and services

*Of eight 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. Only four percent of OAs did not use at least one of the products or services; this includes two percent of OAs who simply were not aware of any of EC's products or services. As was the case for OAs in the 43<sup>rd</sup> GE, the products and services with the highest overall awareness (either used or familiar with) are the Political Financing Handbook (94%), correspondence with EC (91%), the Political Entities Support Network toll-free number (78%) and the EFR videos (72%). Around two-thirds used or are aware of the PESC video (64%) and the self-paced training module (64%), and six in ten are familiar with the political financing cartoons (62%) and the live Q&A sessions (62%). Results are generally similar to the 43<sup>rd</sup> GE survey, except that more report awareness of the cartoons.

Use of EC's products and services follows a similar pattern to overall awareness. Close to nine in ten (87%) used the Political Financing Handbook, over seven in ten (73%) say they corresponded with EC, and half (51%) used the PESN 1-800 number. Four in ten or fewer OAs report using any of the other resources.

## Awareness and use of EC products and services

<b>Q23-31 . Did you use, or were you aware of, the following Elections Canada products and services?</b>	<b>Net aware (used + aware)</b>	<b>Yes, used it</b>	<b>Aware of but not used</b>	<b>Not aware</b>	<b>Not sure</b>	<b>Total 43rd GE Net aware (used + aware)</b>
Political Financing Handbook for Candidates and Official Agents	94%	87%	8%	4%	1%	91%
Correspondence with EC	91%	73%	18%	6%	3%	88%
Political Entities Support Network 1-800#	78%	51%	28%	17%	4%	77%
Electronic Financial Return (EFR) videos	72%	39%	33%	23%	5%	52%
The Political Entities Service Centre (PESC) video	64%	32%	33%	28%	7%	n/a
The self-paced training modules available in Elections Canada's Virtual Training Centre	64%	30%	34%	28%	9%	n/a
Political Financing videos ("cartoons")	62%	28%	35%	32%	5%	43%
The live questions and answers sessions with Elections Canada subject-matter experts	62%	24%	39%	32%	6%	n/a

Similar proportions of OAs across the country and across most subgroups report having used or having been aware of the various products and services. Notable exceptions include more frequent usage among those who attended campaign return training of all products and services except for the Political Financing Handbook and EC correspondence, where use is the same. As well, first-time OAs are more likely than those who have served before to indicate using most of these, except for the Political Financing Handbook, EC correspondence and the 1-800 number.

Some specific products were used more often by certain groups:

- *Correspondence with EC*: file returned by e-mail (81%, vs. 75% filing by PESC or 68% by mail or courier).
- *The Political Entities Support Network 1-800 #*: Quebec (60%) and Atlantic region (61%, vs. 43% to 52% of others), did survey in French (62%, vs. 49% in English).
- *EFR videos*: Return filed via PESC (44%, vs. 28% by mail/courier or 37% by email).
- *PESC videos*: Return filed via PESC (38%, vs. 25% by mail/courier or 30% by email).
- *Self-paced training modules*: Alberta (44%, vs. 17% to 33% of others).

## 2. If EC products and services used were helpful

*The Political Financing Handbook, 1-800# and correspondence are the resources most thought to be helpful by their users.*

OAs who used any products were shown a list of the ones they used and asked to indicate which they found helpful. Nine in ten (89%) who used the Political Financing Handbook indicate it was helpful, as do eight in ten (79%) users of the Political Entities Support Network 1-800 number. Three-quarters (76%) of those who corresponded with EC found this helpful. Majorities say the live questions and answers sessions (62%) and the self-paced training modules (54%) were helpful, while half say this of the cartoons (50%) or the PESC videos (49%).

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

Q32 Which, if any, of these products did you find helpful?*	% saying resource was helpful	
	44 <sup>th</sup> GE	43 <sup>rd</sup> GE
Political Financing Handbook for Candidates and Official Agents (n=475)	89%	91%
Political Entities Support Network 1-800 # (n=278)	79%	78%
Correspondence with EC (n=399)	76%	81%
The live questions and answers sessions with Elections Canada subject-matter experts (n=130)	62%	n/a
The self-paced training modules available in Elections Canada's Virtual Training Centre (n=164)	54%	n/a
Electronic Financial Return (EFR) videos (n=215)	53%	70%
Political Financing videos ("cartoons") (n=151)	50%	55%
The Political Entities Service Centre (PESC) video (n=174)	49%	n/a

\* The (n=) shown for each product are the GE44 survey bases

OAs could also indicate if another resource they used was helpful. Mentions mainly include direct contact with EC and the EC website in general, various auditors or accountants, the associated political party and/or previous OAs and campaign managers.

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

*The main difficulties with the Political Financing website continue to be related to navigation and presentation; training on dealing with the return and self-training modules also may need improvement.*

All official agents were asked what, if any, aspects of finding needed products and services on Elections Canada's Political Financing website were difficult. Nine potential difficulties were provided (marked with an asterisk in the table below) and agents could write in other challenges. Three in ten (29%) experienced no issues. The most mentioned difficulties are that the site is hard to navigate/not user friendly (38%), that using the EFR software or PESC portal is too complicated (31%), that the products cannot be easily found (26%), and that the training for return completion and submission needs improvement (24%). Around two in ten or less provided other reasons as detailed in the table below.

Of the volunteered responses, the most mentioned are that the EFR software is not compatible with their MAC computers, that the process is too complicated or takes too long, or that the EFR is out of date or needs improvement.

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

<b>Q33 What, if any, aspects of finding the products or services you were looking for on Elections Canada's Political Financing website were difficult?</b>	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
Elections Canada website is hard to navigate/not user friendly* (43rd GE: Political Financing website is hard to navigate)	38%	35%
Using the EFR software or PESC portal is too complicated*	31%	n/a
Products for Official Agents cannot be easily found* (43rd GE: Products for Official Agents are not clearly presented)	26%	35%
Training on how to complete/submit return needs improvement*	24%	31%
Too much information on the Elections Canada website* (43rd GE: Too much information on the Political Financing website)	22%	22%
Self-paced training modules about the return need improvement*	13%	n/a
The videos did not address topics required/needed*	11%	n/a
PESC portal is not accessible*	8%	n/a
Links to political financing resources the website did not work* (43 <sup>rd</sup> GE: Links on the Political Financing website did not work)	5%	8%
EFR is not compatible with MAC computers	3%	1%
Process is complicated/takes too long	2%	2%
EFR is out of date/needs improvement	2%	2%
Other	5%	7%
There were no difficulties	29%	29%

\* These options were shown to respondents

Types of difficulties experienced are quite similar across the country and most subgroups. First time agents are more likely than those who have been agents before to have experienced most issues.

#### 4. Agreement with statements about the Political Entities Support Network

*Nine in ten or more agree to some extent with positive statements about their experience with the PESN staff; over seven in ten of OAs strongly agree the EC employee they dealt with via the PESN was courteous.*

Official agents who used the Political Entities Support Network (n=278) were asked to indicate their level of agreement with six statements about the service they received. Strong proportions of nine in ten or more agree to some extent with all statements. Seven in ten (72%) strongly agree the employee with whom they dealt was courteous, and just under six in ten strongly agree they got what they needed (58%) or that the employee was knowledgeable (56%). Over half strongly agree they received a timely response (55%) or that they were satisfied with ease of access to the service (55%). Overall agreement with these statements is similar to the 43<sup>rd</sup> GE survey.

New this survey, almost all (97%) agree to some extent they were able to speak to someone in the language of their choice, including seven in ten (71%) who strongly agree to this.

#### Agreement with statements about the Political Entities Support Network Subgroup: Those who used the Political Entities Support Network (n=278)

<b>Q34-39 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?</b>	<b>Net agree (very + some-what)</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>43<sup>rd</sup> GE Net agree</b>
EC employee was courteous	98%	72%	26%	1%	0%	97%
I was able to speak to someone in the language of my choice (French/English)	97%	71%	26%	<1%	<1%	n/a
I received a response in a timely manner	91%	55%	36%	4%	1%	87%
I was satisfied with the ease of access to the service	91%	55%	35%	5%	2%	87%
In the end, I got what I needed	90%	58%	31%	4%	3%	88%
EC employee was knowledgeable	90%	56%	33%	5%	3%	90%

Strong agreement with these statements is very consistent across the country and most subgroups.

## 5. Agreement with statements about corresponding with Elections Canada

*Just under 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 who said they corresponded with EC by mail or email (n=359) were asked to indicate their level of agreement with four statements about the service they received. Close to nine in ten or more agree at least somewhat with each of the statements; strong agreement is highest (57%) for the statement that the response was courteous. Half strongly agree the response was informative (50%) or that they got what they needed ultimately (49%) and just under half strongly agree the response was timely (47%).

### Agreement with statements about corresponding with Elections Canada Subgroup: Those who corresponded with EC (n=359)

<b>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:</b>	<b>Net agree (very + somewhat)</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>43<sup>rd</sup> GE Net agree (n=415)</b>
The response was courteous	97%	57%	39%	1%	<1%	96%
In the end, I received the information I needed	90%	50%	40%	3%	4%	85%
The response was informative	88%	49%	39%	9%	1%	88%
The response was timely	87%	47%	40%	9%	2%	82%

Strong agreement with these statements is statistically similar across the country and most subgroups of the OA population. A higher proportion (56%) of experienced OAs strongly agreed that in the end they got what was needed than first-time OAs (45%).

## 6. If any difficulties in accessibility were experienced

*About one-quarter of OAs experienced accessibility difficulties when using EC products or services.*

OAs were asked if they personally experienced any difficulties with accessibility when using or interacting with any of Elections Canada's products or services during or after this general election. Around one-quarter (23%) say they did, seven in ten (69%) did not, and just under one in ten (8%) are unable to say. However, *it should be noted that, based on the responses to the next question, most of these difficulties do not appear to relate to accessibility issues faced by OAs who might need accommodation for a physical or cognitive disability or limitation.*

### If accessibility difficulties were experienced

<b>AC01</b> <i>Did you personally experience any difficulties with accessibility when using or interacting with any of Elections Canada's products or services during or after this general election?</i>	<b>Total 44<sup>th</sup> GE</b>
Yes	23%
No	69%
Not sure	8%

Across groups of OAs, only small proportions reported having accessibility difficulties, but these proportions were larger among the following:

- B.C. OAs (33%).
- First-time OAs (27%, vs. 18% with more experience).

## 7. Accessibility difficulties experienced

*Accessibility issues largely relate to technical barriers, as in file upload problems or navigation not being user-friendly.*

OAs who said they experienced an accessibility issue with EC products or services (n=127) were asked what challenges they experienced. It is clear not all of the reported accessibility difficulties relate to OAs who needed additional accommodation for a physical or cognitive limitation, but rather relate to having broader issues with technical difficulties, communications or instructions, or navigation problems. Subgroup sizes are too small to allow for deeper analysis.

### Accessibility difficulties experienced

<b>AC02 What accessibility difficulties did you experience?</b>	<b>Those experiencing accessibility difficulties (n=127)</b>
Unsuccessful files/reports uploading	18%
Bulky/hard to navigate/not user friendly	16%
Hard to log in/poor connection/inaccessible	11%
Software is not compatible with Mac computers	10%
The whole process is extremely complex and time consuming	9%
Poor customer service/unknowledgeable staff	8%
Poor/no communication from staff at EC to update on changes/receipt of files	6%
Rules/guidelines should be explained clearly	6%
EFR is outdated/not intuitive to use	5%
Inputting/updating data/information is complicated/does not appear on all reports	4%
OA problems with computer skills	4%
Inability to download EFR software on my computer	2%
Confusion with inconsistent information from different agents	2%
EC hours of operation	2%
Other issues	9%
No issues	1%
Not sure	5%



## 8. Product and service gaps

*OAs' top needs for products and services continue to be more flexible training availability, software updates (notably the EFR) 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. About one-third provided at least one suggestion. Just under in ten mention a requirement for more flexible training that can be undertaken at any time, also the top response in the 43<sup>rd</sup> GE survey. Fewer OAs mention other individual suggestions, including updating the software (especially the EFR) and making it be compatible with a wider range of platforms, simplifying the process and eliminating duplication, and providing more examples about what expenses to report. One-third do not feel there are any additional products or services that would help them, and one-third are unsure.

### Product and service gaps

*Note: multiple responses were permitted*

<b>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?</b>	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
Training available to OA any time they join/training videos/step-by-step guide	8%	10%
Software to be updated/compatible with all OS (MAC, Linux etc.)	7%	6%
Simplify process/more straightforward/get rid of duplicate paperwork/audit	4%	5%
Update EFR/make it more user friendly/better links	4%	5%
Provide more info/examples to clarify process/what expenses to report	4%	7%
Relax requirements for banks and bank accounts/stay in tune with current banking practices	3%	-
Dedicated knowledgeable staff support to guide/discuss/provide feedback	2%	4%
To confirm receipt once papers/reports are submitted/have an audit sent on time	2%	2%
Make report transmission easier/fillable PDFs or converter needed	1%	3%
Provide a check list for forms to be completed	1%	2%
Contact information to access local office/service when needed for support/inquiry	1%	2%
Other	6%	5%
Nothing else	32%	24%
Not sure	35%	40%

Mentions remain quite consistent across the population. First-time OAs more often mentioned more flexible training (12%, vs. 3% who have more experience), as did those who said the submission of the return was difficult (12%).

## G. Elections Canada audit

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

*About six in ten OAs were contacted by EC after filing the campaign return for the 44<sup>th</sup> GE, identical to the proportion after the 43<sup>rd</sup> GE.*

Just over six in ten (62%) OAs reported that they had been contacted by EC for clarifications or additional information since the filing of the return, identical to the proportion contacted after the 43<sup>rd</sup> GE.

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

<b>Q47 Have you been contacted by Elections Canada for clarifications or additional information since the electoral return was filed?</b>	<b>Total 44<sup>th</sup> GE</b>	<b>Total 43<sup>rd</sup> GE</b>
Yes	62%	62%
No	34%	36%
Not sure	4%	3%

Majorities of OAs in all regions indicated having been contacted following the report submission; the proportion is lower in Manitoba/Saskatchewan (50%) and Ontario (55%) and highest in Quebec (74%). The proportion is notably higher among experienced OAs (71% vs. 55% of first timers) and those who acted for two or more candidates (82% vs, 61% with only one candidate).

### 2. How post-filing EC contact was made

*Over nine in ten who were contacted by EC after the return was filed were reached by email.*

Those who were contacted by EC following their submission of the campaign return (n=339) were asked how this contact was made (OAs could indicate both potential contact methods). Almost all (96%) say contact was made via email, and just under four in ten (37%) say they received a phone call.

#### How post-filing EC contact was made

*Note: multiple mentions were permitted*

**Subgroup: Those contacted by EC since electoral return was filed**

<b>Q48 How did Elections Canada contact you?</b>	<b>44<sup>th</sup> GE (n=339)</b>	<b>43<sup>rd</sup> GE (n=375)</b>
Email	96%	89%
Telephone	37%	40%
Not sure	<1%	1%

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

*Strong majorities of three-quarters or more agree with each of eight statements about their EC interactions after the return was filed. Agreement is highest that the EC employee was courteous, and lowest that they provided clear information.*

OAs who were contacted by EC following the return submission (n=339) were asked to indicate their level of agreement with several statements about their interactions with EC. Three-quarters or more agree to some extent with each statement. Overall and strong agreement is highest that the employee was courteous (96% overall agreement, 58% strongly agree), and lowest that they were given clear information about any required next steps following the completion of the audit (76%), a new statement added in the 44<sup>th</sup> GESurvey. Overall agreement for statements is generally similar to the survey after the 43<sup>rd</sup> GE.

#### Agreement with statements about interactions with EC after the return was filed Subgroup: Those contacted by EC since electoral return was filed (n=339)

<b>Q49-55x To what extent do you agree or disagree with the following statements about your interaction with Elections Canada after the return was filed:</b>	<b>Net agree (very + somewhat)</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>43<sup>rd</sup> GE Net agree</b>
Elections Canada employee was courteous	96%	58%	38%	1%	1%	94%
Elections Canada employee responded to my questions in a timely manner	86%	42%	43%	7%	2%	84%
Elections Canada employee was knowledgeable	86%	46%	41%	6%	2%	83%
Elections Canada employee provided sufficient time to complete the task	85%	46%	39%	8%	4%	83%
It was easy to submit the requested information	82%	41%	41%	19%	4%	75%
Elections Canada employee clearly described the steps needed to complete the task	81%	45%	37%	14%	2%	82%
Elections Canada employee followed up regularly after the initial contact until the task was complete	79%	39%	0%	11%	3%	67%
Elections Canada employee gave clear information about any required next steps following the completion of the audit	76%	40%	37%	14%	5%	n/a

Strong agreement with positive statements about EC interactions is generally similar across most subgroups. Quebec OAs are the most likely to strongly agree the employee was courteous (75%). Strong agreement with all statements is higher among those who used PESC to file the campaign return, and those indicating the return was easy to complete or submit.

## H. Closing of the campaign

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

*The easiest aspects of closing the campaign continue to be 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. As was the case in the survey following the 43<sup>rd</sup> GE, the easiest steps were closing the campaign bank account and disposing of any surplus (net easy 72% each in 2023). These are followed by completing and submitting the statement of surplus (64%) and fulfilling reporting requirements (62%). One in seven (14%) did not indicate that any of these tasks was easy.

#### Ease or difficulty of completing steps for closing the campaign

<b>Q56-59 For each of the following steps for closing the campaign, please indicate how easy or difficult it was to complete:</b>	<b>Net easy (very + somewhat)</b>	<b>Very easy</b>	<b>Some-what easy</b>	<b>Some-what difficult</b>	<b>Very difficult</b>	<b>Not sure</b>	<b>43<sup>RD</sup> GE Net easy</b>
Closing the campaign bank accounts	72%	40%	33%	14%	6%	8%	65%
Disposing of any surplus	72%	37%	35%	10%	6%	13%	57%
Completing and submitting the statement of surplus	64%	22%	42%	17%	8%	11%	48%
Fulfilling all reporting obligations before closing the campaign	62%	17%	45%	25%	9%	3%	56%

Saying each requirement was at least somewhat easy to accomplish is generally similar across the country. Saying it was at least somewhat easy to fulfil all reporting requirement is lower in B.C. (51%) than elsewhere (60% to 70%). This is also higher among older OAs (67% age 55 and over, vs. 53% of younger OAs), experienced OAs (73% vs. 54% acting for the first time) and those who attended training (67%, vs. 59% who did not). Those who found it easy to complete or submit the return also found it easier to fulfil all requirements (82% who found it easy to complete vs. 39%; 80% who found it easy to submit vs. 37%).

## 2. Other comments

*OAs would like to see a simplified process, improvements to the EFR software and PESC, streamlined audits, and more recognition that many OAs are volunteers by being flexible about timelines.*

OAs provided a range of comments when asked if there was anything not covered in the survey they would like to share.

There were many requests for EC to make the process easier and less onerous. It was felt EC was heavy-handed when dealing with OAs and campaign audits, with some calls to be less punitive of errors to recognize that most OAs are volunteers and not professionals. Some felt they were being treated as criminals for honest mistakes. They would like EC to be less aggressive and more flexible on deadlines and in allowing extensions. It was noted that EC gives itself a long time to review returns, but that OAs are allowed only a few days to respond to requests.

Some suggested ways to streamline audits: increasing audit limits for contributions to reflect current economics, only requiring audits if the candidate achieves a certain % of vote and is over the audit limit. Some felt EC should be exclusively responsible for the auditing, since few private auditors appear to understand procedures and requirements. A small number of OAs made comments about audits being overly focused on tiny discrepancies, suggesting Elections Canada needs a *de minimis* rule, as in their opinion a lot of time and effort is spent tracking down insignificant amounts of money. There were also complaints that a \$3,500 minimum audit was being required of a low budget campaign. There were a small number of complaints about leftover campaign signs in just satisfactory condition needing to be valued at market/replacement value, which was felt to violate basic accounting principles.

There were comments regarding the banking requirements, about having to open accounts for small campaigns and needing to close repeat candidates' accounts between elections (and having to incur costs for cheques and deposit slips each time). Some also mentioned areas where communications between EC and OAs could be improved: more advance notice for rule changes, having clear contact info and a handbook/startup guide link on home page, less wordy explanations on how to do things, and the need for a notice of receipt when documents are uploaded to PESC and a formal confirmation of closure when everything is done. It was noted that one OA complained a unilingual Anglophone was the one to review their submitted French documents.

As was the case in the survey after the 43<sup>rd</sup> GE, some OAs complained about the EFR being dated and counterintuitive, and that these functions need to be web-based if it cannot be made cross-platform (e.g. for Mac users).

## II. Conclusions

The survey conducted after the 44<sup>th</sup> GE shows that six in ten official agents were acting in the capacity for the first time, somewhat lower than in the 43<sup>rd</sup> GE, but still a majority. This may suggest that OAs do not return to this position for various reasons, which continues to be backed up by comments in the survey about the workload and the demands the role makes on volunteers. A couple of OAs commented that the task seems more suited to professional accountants, and the costs of compliance with auditing requirements seems high for campaigns with small budgets. There is a suggestion that some of the stringent requirements may prevent first-time candidates or small campaigns from taking part in the electoral process.

EC staff continues to get a notable amount of recognition for their courtesy and help to OAs, but there remain concerns about a lack of communication of new rules, high entry requirements for small campaigns, and frustration caused by repetition of tasks and difficulties with software and website navigation. EC is advised to “close the loop” by providing confirmation of receipt of documents submitted electronically and by informing candidates and OAs when the campaign file has finally been closed.

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

- Simplify navigation on the web site so that OA services and resources are not lost amid the wealth of information available;
- Prioritize communications about the training and services available to OAs;
- 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
- Ensure OAs have positive experiences with EC staff and auditors by having more flexible timelines for responding to requests for information or clarification, maintaining a sense of proportion and not making OAs jump through hoops for very small discrepancies, and giving OAs (especially first time OAs) the benefit of the doubt when mistakes occur.

### III. Characteristics of Official Agents

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

Age	N	%	43 <sup>rd</sup> GE %
18-34	41	7%	8%
35-44	75	14%	11%
45-54	78	14%	16%
55-64	143	26%	24%
65-74	162	30%	35%
75+	49	9%	6%

Gender	N	%	43 <sup>rd</sup> GE %
Female	184	34%	35%
Male	347	63%	63%
Other/refused	17	3%	2%

Language spoke most often at home	N	%	43 <sup>rd</sup> GE %
English	536	98%	97%
French	17	3%	3%
Other	10	1%	2%

Language of survey	N	%	43 <sup>rd</sup> GE %
English	466	85%	80%
French	82	15%	20%

Education	N	%	43 <sup>rd</sup> GE %
Less than a high school diploma or equivalent	2	<1%	<1%
High school diploma or equivalent	31	6%	6%
Registered Apprenticeship/other trades/trades certificate	4	1%	2%
College, CEGEP, non-university certificate/diploma	76	14%	16%
University below bachelor's level	36	7%	9%
Bachelor's degree	201	37%	32%
Postgraduate degree above bachelor's level	183	33%	32%
Prefer not to say	15	3%	2%

<b>Employment</b>	<b>N</b>	<b>%</b>	<b>43<sup>rd</sup> GE %</b>
Working full-time	215	39%	37%
Working part-time	42	8%	5%
Self-employed	90	16%	18%
Unemployed, but looking for work	8	1%	2%
A student attending school full-time	1	<1%	0%
Retired	176	32%	34%
Not in the workforce	4	1%	2%
Other	7	1%	1%
Prefer not to say	5	1%	1%

<b>Province/Territory</b>	<b>N</b>	<b>% in survey</b>	<b>% of OA list</b>
BC	73	13%	13%
AB	55	10%	11%
MB	25	5%	4%
SK	17	3%	3%
ON	217	40%	37%
QC	101	18%	22%
NB	12	2%	3%
NS	23	4%	3%
PE	8	1%	1%
NL	11	2%	2%
Territories	6	1%	1%



## 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 Survey of Official Agents following the 44<sup>th</sup> federal General Election. This survey aimed to assess official agents' views and experiences with the 44<sup>th</sup> 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 44<sup>th</sup> GE, through a self-administered online questionnaire.

Elections Canada provided Environics with contact information (emails) for 1,486 (unduplicated) Official Agents (a few OAs had two different emails; these were kept as it could not be confirmed which they might be monitoring). A total of 548 Official Agents completed the survey, representing 37 percent of the records provided. The online survey was open from February 16 to March 26, 2023.

The participating respondents have the following regional distribution:

Breakdown/Location	Total	Atlantic	Quebec	Ontario	MB/SK	Alberta	BC/Terr
Number of completed interviews	548	54	101	217	42	55	79
% of completed interviews	100%	10%	18%	40%	8%	10%	14%
Number of OA unduplicated contacts	1,486	130	331	553	110	160	202
% of total OA contacts	100%	9%	22%	37%	7%	11%	14%

This is an attempted census rather than a sample survey so 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 an 18-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 20 months prior and thus recall may be an issue for some.

## Instrument design

Environics and EC designed a questionnaire that addresses the study objectives, largely based on the questionnaire of the Survey of Official Agents following the 44<sup>th</sup> General Election. 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 11.4 minutes, and the average was 16.5 minutes. All research instruments are in Appendix B.

## Pre-test

EC sent out an advance broadcast email advising OAs of the upcoming data collection. Environics sent out 50 English and 50 French pre-test invitations on February 16, 2023 from which 12 interviews (6 English, 6 French) were completed. The pre-test included standard, government-accepted probing questions on comprehension and appropriateness of language at the end of the survey, and no issues were identified.

## 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 548 interviews with Official Agents. The response rate for the survey is 37 percent. The disposition of all contacts is presented in the following table:

#### Completion results

		<b>N</b>
Total invitations	(c)	1,486
Total completes	(d)	548
Qualified break-offs	(e)	77
Disqualified	(f)	9
Not responded	(g)	908
Quota filled	(h)	0
Contact rate = (d+e+f+h)/c		42.7
Response rate = (d+f+h)/c		37.4

## Appendix B: Research instruments

### Advance e-mail broadcast



#### Subject: Survey of Official Agents

(le texte français suivra)

Good day,

As part of its post-election activities, Elections Canada is reaching out to the official agents of candidates in the general election of **September 20, 2021** 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. 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 [Correspondance-Correspondence@elections.ca](mailto:Correspondance-Correspondence@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, Centre of Operations  
Political Financing

**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 **September 20, 2021** 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 this process. 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:

**INSERT 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 13, 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 [Correspondance-Correspondence@elections.ca](mailto:Correspondance-Correspondence@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](http://www.canadianresearchinsightscouncil.ca/rvs/home/?lang=en) and enter reference project code 20230208-EN925.

## Elections Canada — Official Agents 2023

### 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 September 20, 2021. 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 [Correspondance-  
Correspondence@elections.ca](mailto:Correspondance@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](mailto: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](http://www.canadianresearchinsightscouncil.ca/rvs/home/?lang=en) and enter reference project code 20230208-EN925.

Please click on >> to continue.

**[RED = SKIP/BRANCH/PROGRAMMING LOGIC]**

#### Screening

##### 2020 Q1

1. Were you an official agent for a candidate who ran in the general election of **September 20, 2021**?

01 Yes

02 No

03 Not sure

**THANK AND TERMINATE**

**THANK AND TERMINATE**

## Information about official agents

## Experience in role of official agent

## 2020 Q2

2. Was it your first time acting as an official agent for a candidate campaign?
- 01 Yes
  - 02 No
  - 99 Not sure

## 2020 Q3

3. For how many candidates did you act as official agent in the September 2021 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**

## Getting the campaign underway

## Opening the bank account

## 2020 Q6

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

## 2020 Q7

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
- 04 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**

## 2020 Q8

8. Were you the official agent at the time the electoral campaign return was prepared and submitted?
- 01 Yes
  - 02 No **SKIP TO PE01**
  - 98 Not sure **SKIP TO PE01**

**Method Used to Submit the Electoral Campaign Return**

## 2020 Q9

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

*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
- 98 Not sure **[SINGLE MENTION]**

**Training**

## 2020 Q10

10. Did you attend or access self-paced training on how to complete and submit the return?
- 01 Yes
  - 02 No
  - 98 Not sure



**NEW -ASK 10B IF 02-NO AT Q10**

10B Why did you not attend or access the training on how to complete and submit the return?

*RANDOMIZE 01-05*

*Select all that apply*

- 01 Do not like the online format for training
- 02 The timing of the sessions was not convenient
- 03 I was not aware of what was available
- 04 I did not know how to access it
- 05 Did not find the information useful
- 06 Other
- 99 Not sure **[SINGLE MENTION]**

**Ease of completing the Electoral Campaign Return****2020 Q11**

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
- 98 Not sure

**2020 Q12**

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
- 98 Not sure

## 2020 Q13

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

**Select any statements that apply**

**RANDOMIZE 01-05**

- 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
- 06 Other **(Please specify) DO NOT CODE – VERBATIMS TO BE REVIEWED**
- 07 No aspects were difficult **[SINGLE MENTION]**
- 99 Not sure **[SINGLE MENTION]**

**Electronic Financial Return (EFR)**

## 2020 Q14

14. SHOW TO ALL: The Electronic Financial Return (EFR) is free software designed to help political entities issue contribution receipts and prepare their financial returns.

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

- 01 Yes
- 02 No **SKIP TO Q20**
- 98 Not sure **SKIP TO PE01**

**IF Q14 = 01 ASK Q15-19x:** 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 15-19x**

**2020 Q15-19**

- 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 create the submission file were not clear
- 19. It was easier to file the financial return using the EFR software than with the manual process
- 19x The EFR software is accessible **(NEW)**
  - 01 Strongly agree
  - 02 Agree
  - 03 Disagree
  - 04 Strongly disagree
  - 98 Not sure

**2020 Q20**

- 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 message when I attempted to use the EFR software to prepare the final financial return file
- 06 Prefer to prepare the financial return manually
- 97 Other **(Please specify) DO NOT CODE – VERBATIMS TO BE REVIEWED**

## NEW SECTION

## PESC

PE01 SHOW TO ALL: The Political Entities Service Centre (PESC) is a tool that allows you to access electoral products and services and to upload and submit financial returns.

Did you use the Political Entities Service Centre (PESC portal) to upload and submit the candidate campaign return?

01 Yes

02 No

**ASK PE02**

99 Not sure

**SKIP TO NEXT SECTION**

PE02 Why did you not use the Political Entities Service Centre (PESC portal) to submit the campaign return or any other document?

**RANDOMIZE 01-04**

*Select any that apply*

01 Was not aware of what to use the PESC portal for

02 Was not able to figure out how to log in

03 Was not able to figure out how to submit

04 Preferred to submit it another way

97 Other *(Please specify)* **DO NOT CODE – VERBATIMS TO BE REVIEWED**

99 Not sure **[SINGLE MENTION]**

**IF NO OR NOT SURE AT PE01 SKIP TO NEXT SECTION**

PE03 How easy or difficult was it to use the PESC portal to submit the campaign return and other documents?

01 Very easy

02 Somewhat easy

03 Somewhat difficult

04 Very difficult

99 Not sure

PE04 Did you require support to upload and submit your campaign return?

01 Yes

**ASK PE05-06**

02 No

**SKIP TO NEXT SECTION**

99 Not sure

**SKIP TO NEXT SECTION**

PE05 What errors or difficulties did you encounter with PESC that required support?

**RANDOMIZE 01-06**

*Select any that apply*

- 01 I could not find the candidate I wanted to upload and submit for
- 02 I did not know how to switch entities
- 03 I could not remember my passphrase or reset it online
- 04 The link I got to set up my account did not work
- 05 I needed help applying digital consent
- 06 I needed help to upload my documents
- 07 Other
- 99 Not sure **[SINGLE MENTION]**

PE06 How easy or difficult was it to obtain support to upload and submit your 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 for candidate campaigns?

*Please choose one response for each resource*

**SET UP AS GRID****2020 Q23-31 VARIATIONS**

23. The Political Financing Handbook for Candidates and Official Agents
24. The Political Financing videos (“cartoons”)
25. Electronic Financial Return (EFR) videos
26. The Political Entities Service Centre (PESC) video
27. The self-paced training modules available in Elections Canada’s Virtual Training Centre
28. The live questions and answers sessions with Elections Canada subject-matter experts (held in late October 2021)
- ~~29. DELETED~~
30. The Political Entities Support Network 1-800 #
31. Correspondence with Elections Canada (by email at [political.financing@elections.ca](mailto: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*

#### 2020 Q32

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 The Political Entities Service Centre (PESC) video
- 05 The self-paced training modules available in Elections Canada’s Virtual Training Centre
- 06 The live question-and-answer sessions with Elections Canada subject-matter experts (held in late October 2021)
- 07 The Political Entities Support Network 1-800 #
- 08 Correspondence with Elections Canada (by email at [political.financing@elections.ca](mailto:political.financing@elections.ca) or by mail)
- 09 Another resource not listed was helpful (*Please specify*) **DO NOT CODE – VERBATIMS TO BE REVIEWED – SHOW TO ALL ASKED**
- 99 None were helpful **[SINGLE MENTION] – SHOW TO ALL ASKED**

#### 2020 Q33 VARIATION

33. What, if any, aspects of finding or using the products or services available on the Elections Canada website were difficult?

*Select any statements that apply*

**RANDOMIZE 01-09**

- 01 The Elections Canada website is hard to navigate/not user friendly
- 02 The products for Official Agents cannot be easily found
- 03 There is too much information on the Elections Canada website
- 04 The links to political financing resources on the website did not work
- 05 The training provided on how to complete and submit the electoral campaign return needs improvement
- 06 The PESC portal is not accessible
- 07 Using the EFR software or PESC portal is too complicated
- 08 The videos did not address topics required/needed
- 09 The self-paced training modules about the electoral campaign return need improvement
- 10 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*

**2020 Q34-38**

- 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. I was able to speak to someone in the language of my choice (French/English)
  - 39. In the end, I got what I needed
- 01 Strongly agree
  - 02 Agree
  - 03 Disagree
  - 04 Strongly disagree
  - 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*

**2020 Q40-43**

- 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



**Product and Services Gaps****ASK ALL****NEW**

AC01 Did you personally experience any difficulties with accessibility when using or interacting with any of Elections Canada's products or services during or after this general election?

- 01 Yes **ASK QAC02**
- 02 No **SKIP TO Q46**
- 99 Not sure **SKIP TP Q46**

**NEW**

AC02 What accessibility difficulties did you experience?

**[OPEN-ENDED]**

**2020 Q46**

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****2020 Q47**

47. Have you been contacted by Elections Canada for clarifications or to ask questions as part of an audit of the candidate campaign submission?

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

**2020 Q48**

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 concerning the candidate campaign audit:

*Please select one response for each statement*

**SET UP AS GRID**

**2020 Q49-55**

- 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
- 55x The Elections Canada employee gave clear information about any required next steps following the completion of the audit

- 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*

**2020 Q56-59**

- 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.

**2020 Q60**

- 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

## 2020 Q61

61. How do you identify your gender?

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

## 2020 Q62

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

**MULTIPLE RESPONSE PERMITTED**

- 01 English
- 02 French
- 03 Other

## 2020 Q63

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

## 2020 Q64

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****2020 Q65**

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 September 20, 2021?

**[OPEN-ENDED]**

99 Nothing else

**2020 Q66**

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

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**RECORD:**

**2020 Q67**

67. Type of device used to complete survey