

# **ELECTIONS CANADA**

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Local Outreach in the 41st General Election  
Key Learnings Report

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## Purpose of this Report

During the 41st general election, a number of evaluation activities were conducted that were related in whole or in part to local outreach and the Community Relations Officer (CRO) program. This report summarizes the key observations from these activities. Based on these observations, the report provides Elections Canada's Outreach Coordinating Committee with recommendations for enhancing local outreach to target groups in the areas of work between elections, the outreach function in the local Elections Canada office ("RO office"), recruitment and training, local outreach supporting access to the electoral process, outreach tools and the Aboriginal Elder and Youth Program.

## Information Sources

Information for this report was gathered from the following sources on the 41st general election:

- **41st General Election Evaluation Survey – Report of Proceedings (41st GE Evaluation Survey):** Presents results of surveys of returning officers in the 41st general election.
- **Aboriginal Elder and Youth Program Evaluation Survey:** Provides results of surveys of those working in the program during the election.
- **Community Relations Officer Program Observations Summary Report (CRO Summary Report):** Presents observations and recommendations from visits with CROs in the field during the 41st general election.
- **Community Relations Officer Evaluation Survey (CRO Evaluation Survey):** Provides an analysis of 303 questionnaires completed by CROs.
- **Outreach Progression Report Summary:** Summarizes the responses to the weekly questionnaire, completed by returning officers, on CRO activities.
- **Returning Officers Post-Mortem Sessions Summary:** Provides feedback from returning officers following the 41st general election.
- **Summary of Outreach Activities in the 41st General Election:** Presents comments by CROs on the effectiveness of outreach activities.
- **41st General Election – Survey of Administrators Regarding the Use of the Voter Identification Card as Proof of Address (Survey of Administrators):** Presents the results of a June 2011 survey of administrators in seniors' residences and long-term care facilities, First Nations band offices and student residences.

## Recommendations Summary

### Work Between Elections

- Undertake the following outreach activities on an ongoing basis before and between elections:
  - Conduct more work immediately preceding the election to ensure that when the election is called, field staff are ready to deliver outreach activities supporting registration, voting, and the dissemination of information to electors about the electoral process. Tasks would include identifying what was done in the previous election, reconnecting with past contacts or establishing new relationships (particularly important when working with Aboriginal communities), establishing action plans in collaboration with administrators and consulting administrators to find solutions to possible barriers to registering and voting. This process would be greatly facilitated by additional pre- and post-election work, such as tracking completed activities, the results of those activities, as well as best practices, and by keeping records current.
  - Conduct local outreach to support civic education, such as an annual civic education blitz to schools, educators, school boards and associations. Determine who is best suited to do this work – the returning officer, field liaison officer or someone else.

### The Outreach Function in the Local Elections Canada Office

- Complete a review of outreach activities performed in the field and consider who could best do them (community relations officer, targeted revision agent, special ballot coordinator).
- Review the role and functions of the CRO position and ensure they are understood by CROs.
- Make one role the single point of contact at the local Elections Canada office to coordinate and work with the other relevant positions (e.g. revision supervisor, special ballot coordinator) and to liaise with external stakeholders and administrators of long-term care facilities and post-secondary institutions.
- Examine ways to coordinate outreach across electoral districts and regions.

### Recruitment and Training

- On an ongoing basis, Elections Canada in Ottawa (headquarters) should provide support to returning officers in recruiting and training CROs. This support would include:
  - Providing recruitment guidelines and recommendations
  - Offering recruitment training to returning officers and assistant returning officers
  - Examining the feasibility of making the position more attractive to candidates (improved pay scale, additional hours between elections)
  - Developing an outreach orientation program for returning officers, CROs and any field staff involved in outreach activities, with a consistent curriculum
  - Considering a formal program that recruits students from post-secondary institutions and offers ongoing work throughout the year on a four-year cycle

## **Local Outreach Supporting Access to the Electoral Process**

- CROs should continue to collaborate with administrators in seniors' residences and long-term care facilities, post-secondary institutions, and band administrators, and to work closely with all target groups to facilitate access to, and provide information about, the electoral process.
- Face-to-face field outreach should be leveraged when introducing changes in the electoral process and communicating how, when and where to vote.
- The voter identification regime should be simplified.

## **Outreach Tools**

- Promotional tools should be enhanced by using plain language in all materials, tailoring content for target groups, and translating more materials into various languages.
- Field staff performing outreach functions should be provided with the necessary tools, such as a computer or laptop and communications devices, to perform effectively in the role.
- Elections Canada should develop a policy on the use of social media and a social media and Web tool kit that would guide field staff in the appropriate and effective use of these new platforms.

## **Aboriginal Elder and Youth Program**

- While there were fewer participants in the program in the 41st general election, the majority of Elders, youth and CROs who were surveyed indicated that the program continues to provide benefits to the electors it serves and is well received within the community. The program should be continued and reviewed as more information becomes available through research on barriers to the electoral process experienced by Aboriginal people.

## Introduction

Elections Canada launched the Community Relations Officer (CRO) program in 2000. The program is a key element of Elections Canada's outreach activities in all 308 electoral districts. Its goal is to make voting more accessible to target groups by removing barriers to registration and voting and improving knowledge and understanding of the election. CROs work with the following five target groups:

- youth
- Aboriginal electors
- seniors living in residences and long-term care facilities
- ethnocultural communities
- homeless electors

Research indicates that these target groups generally experience barriers to voting, and some participate at lower rates in federal elections than the general population.

CROs are hired to work with a specific target group within their electoral district. In particular, the CRO communicates with members of the target group to:

- Increase election awareness
- Provide information on how, when and where to register and vote
- Explain the importance of registering and voting
- Make voting as accessible as possible for the target group

CROs deliver their messages by holding information kiosks, making presentations, hosting discussion groups and distributing communications material. Specifically, the work of community relations officers includes:

- Identifying key contacts and stakeholders within their target group and establishing a professional relationship with them
- Contacting organizations that work within the targeted community – for example, Aboriginal friendship centres, student associations, drop-in centres for youth, ethnocultural social clubs, and housing and social service agencies
- Encouraging members of their target group to discuss the election among themselves, through activities such as round table discussions, presentations by youth organization leaders or teachers, distribution of information by administrators of homeless shelters and announcements at public events
- Holding presentations, information sessions and round table discussions and distributing communications material to inform members of the target group

- Setting up information kiosks at public locations used by members of the target group, such as friendship centres, community centres, shopping centres, secondary schools, university or college centres, and community events
- Directing media requests to the proper Elections Canada contact persons
- Monitoring media that target the assigned community
- Explaining options for registration and voting to members of the target group

CROs conduct outreach activities to engage all members of the target group in the voting process. They work with election staff, community contacts and a variety of organizations. They need to understand the history, culture and needs of the population they serve and know about the key stakeholders involved with the target group.

Most importantly, as representatives of Elections Canada, they must remain politically neutral (impartial) and respect the wishes of the target groups in their electoral district.

## The CRO Program in the 41st General Election

Elections Canada hired 863 community relations officers for the 41st general election, in comparison to 529 for the 40th general election.

For the first time in a general election, Elections Canada hired 300 CROs to work with administrators in seniors' residences and long-term care facilities, to help administrators and electors understand the requirements for registration and voting – namely the initiative of accepting the voter information card as proof of identity and address.

Outreach to Aboriginal communities also included hiring 303 people in the Aboriginal Elder and Youth Program, compared with 349 for the 40th general election. These individuals assisted voters on polling day by explaining the voting process, answering general questions and providing translation services.

The two tables below list the number of community relations officers and Aboriginal Elders and youth hired for the 40th and 41st general elections.

<b>Summary of community relations officers by target group</b>		
	<b>Number of community relations officers hired for the 40th general election</b>	<b>Number of community relations officers hired for the 41st general election</b>
Youth	200	230
Ethnocultural	143	129
Aboriginal	154	164
Homeless	32	40
Seniors	0	300
<b>Total</b>	<b>529</b>	<b>863</b>

<b>Summary of Aboriginal Elders and youth</b>		
	<b>Number of Aboriginal Elders and youth hired for the 40th general election</b>	<b>Number of Aboriginal Elders and youth hired for the 41st general election</b>
Elders	168	163
Youth	181	140
<b>Total</b>	<b>349</b>	<b>303</b>



## Observations and Recommendations

This section provides a synthesis of the key observations and related recommendations, grouped into six areas:

- Work between elections
- The outreach function in the local Elections Canada office;
- Recruitment and training
- Local outreach supporting access to the electoral process
- Outreach tools
- Aboriginal Elder and Youth Program

### Work Between Elections

A repeated observation was that outreach work is more difficult if it is confined mainly to the election period, starting with the issue of the writs and ending on election day.

CROs commented that engaging with stakeholders, getting them to obtain approvals from their organizations and nurturing key relationships is a time-consuming process. The five-week electoral period is too short to be very successful in building relationships (CRO Summary Report, 18).

In the case of students at post-secondary institutions, this election fell at a time when they were in exams, finishing up course work or leaving campus. As a result, it was not an ideal time of year for outreach activities (CRO Summary Report, 19).

For community outreach during an election to be effective, returning officers mentioned many activities that need to be undertaken before an election is called. These include pre-approval of travel; CRO recruitment, guidance and training; liaising with administrators of seniors' residence and long-term care facilities; working with schools; pre-event exercises and planning; and outreach to communities (Returning Officers Post-Mortem Sessions Summary, 2, 6).

Some CROs also saw the need for activities outside the formal election period. Some called for year-round education programs about elections in Canada. Others called for more time to build relationships and awareness of the CRO program (CRO Evaluation Survey, slide 18).

Returning officers indicated that contact with band administrators on reserves needs to be established prior to the election, to allow time to build collaborative relationships, develop approaches for outreach to individual Aboriginal groups and gain access to reserves. In some electoral districts with more than 20 reserves, returning officers indicated that 36 days is not long enough for outreach activities (Returning Officers Post-Mortem Sessions Summary, 11).

Returning officers called for ongoing outreach with schools and teachers, such as incorporating knowledge of the electoral process into the curriculum (Returning Officers Post-Mortem Sessions Summary, 12).

Similar comments were heard from administrators of seniors' residences, long-term care facilities, First Nations band offices and student residences. They mentioned that earlier contact or notification would allow for better planning (Survey of Administrators, 20).

If outreach is limited mainly to the basic 36-day election period, there are two main problems:

- Insufficient time to learn and perform the necessary tasks, and to build relationships with stakeholders.
- Lack of continuity and loss of corporate memory. Contacts used in a previous election may no longer be available. Relationships that were established may have been allowed to lapse. Records may lack information about who was helpful and what worked well in the previous election.

Outreach activities are supposed to be based on an action plan. Three quarters of CROs saw the outreach action plan as a useful tool (CRO Evaluation Survey, slide 28). The majority of CROs had an action plan. Those who did were not always working with the most up-to-date and useful plans. Information on contacts was not always recorded in the action plan or elsewhere for use by field staff in future elections (CRO Summary Report, 16).

### **Recommendations**

- Undertake the following outreach activities on an ongoing basis before and between elections:
  - Conduct more work immediately preceding the election to ensure that when the election is called, field staff are ready to deliver outreach activities supporting registration, voting, and the dissemination of information to electors about the electoral process. Tasks would include identifying what was done in the previous election, reconnecting with past contacts or establishing new relationships (particularly important when working with Aboriginal communities), establishing action plans in collaboration with administrators and consulting administrators to find solutions to possible barriers to registering and voting. This process would be greatly facilitated by additional pre- and post-election work, such as tracking completed activities, the results of those activities as well as best practices, and by keeping records current.
  - Conduct local outreach to support civic education, such as an annual civic education blitz to schools, educators, school boards and associations. Determine who is best suited to do this work – the returning officer, field liaison officer or someone else.

## **The Outreach Function in the Local Elections Canada Office**

A frequently made observation was that there was considerable overlap of roles, such as those of the community relations officer, targeted revision agent and special ballot coordinator, as well as the recruitment function in the local Elections Canada office (“RO office”). Returning officers were not always clear on these roles and indicated that the interpretation is often left up to the returning officers. While returning officers felt that the roles became clearer during the process, they did not always have enough information and training on the various roles at the beginning. Some returning officers advocated a team approach to these activities – for example, the revision supervisor and CRO working in the field as a team, or the CRO for seniors and the special ballot coordinator working together to provide services in seniors’ residences and long-term care facilities (Returning Officers Post-Mortem Sessions Summary, 12). In some areas, CROs were unclear about their role (CRO Evaluation Survey, slide 5).

Most returning officers hired the number of CROs they were provided. When a position was left vacant, one of the main reasons evoked was that the returning officer did not see a need for the position because other field staff were able to conduct the necessary outreach activities (41st GE Evaluation Survey).

A repeated observation was that external stakeholders received information from multiple sources at Elections Canada, on multiple occasions. For example, nearly half of administrators of residences and long-term care facilities who obtained information from Elections Canada reported an average of four calls or contacts. About half of the time they were unable to identify their exact source at Elections Canada (Survey of Administrators, CRO Summary Report). In the 41st general election, the decision of who would contact these administrators, the CRO or revision supervisor, was made by the returning officer. This service model has the potential to create confusion and provide less than optimum guidance to external stakeholders. It also does not facilitate longer-term relationship-building.

Some CROs worked with their colleagues in neighbouring electoral districts to conduct outreach activities, for example, where a university campus extended across electoral district boundaries. However, there was generally little coordination across districts or regions (CRO Summary Report).

Some returning officers suggested creating additional CRO positions depending on the specific needs of the electoral district, such as a CRO for accessibility or a CRO for mental health disabilities (Returning Officers Post-Mortem Sessions Summary, 11).

## Recommendations

- Complete a review of outreach activities performed in the field and consider who could best do them (community relations officer, targeted revision agent, special ballot coordinator).
- Review the role and functions of the CRO position and ensure they are understood by CROs.
- Make one role the single point of contact at the local Elections Canada office, to coordinate and work with the other relevant positions (e.g. revision supervisor, special ballot coordinator) and to liaise with external stakeholders and administrators of long-term care facilities and post-secondary institutions.
- Examine ways to coordinate outreach across electoral districts and regions.

## Recruitment and Training

Returning officers and assistant returning officers almost unanimously identified recruitment of CROs – and other election workers – as a major challenge. They are recruited every few years for a short-term position. Even if an effort is made to recruit early, the individual selected may not be available when an election is called.

CROs brought varying skill sets and levels of experience to their position. They generally received little or no formal training beyond a meeting with the returning officer and/or assistant returning officer, who gave an overview of the position, reviewed the existing outreach action plan and contact list for the electoral district and provided a copy of the CRO Guide for further reading. About half of CROs felt that more training would have been useful.

While there was a decrease from 32 percent in 2008 of CROs who reported that their job responsibilities were not outlined clearly enough, 18 percent still indicated that this was the number-one issue they encountered as a CRO. In addition, 11 percent felt that job responsibilities should be reviewed and 8 percent listed this as a potential program improvement (CRO Evaluation Survey, slides 13, 14, and 18).

## Recommendations

- On an ongoing basis, Elections Canada in Ottawa (headquarters) should provide support to returning officers in recruiting and training CROs. This support would include:
  - Providing recruitment guidelines and recommendations
  - Offering recruitment training to returning officers and assistant returning officers
  - Examining the feasibility of making the position more attractive to candidates (improved pay scale, additional hours between elections)
  - Developing an outreach orientation program for returning officers, CROs and any field staff involved in outreach activities with a consistent curriculum
  - Considering a formal program that recruits students from post-secondary institutions and offers ongoing work throughout the year on a four-year cycle

## Local Outreach Supporting Access to the Electoral Process

Motivating electors means getting them to the point where they are willing to engage in the electoral process. Facilitating access to the electoral process means taking them beyond that point so that they can successfully participate and vote. This involves providing simple procedures and the necessary information in an understandable format, identifying facilities that do not have physical barriers and working with stakeholders to solve access-related issues before and during the election. The task of local outreach is to provide broad support that facilitates access, particularly in negotiating the electoral process (registration, voting) and in understanding any changes or new initiatives.

The voting process was *the* key concern expressed by CROs' stakeholders. For example, they indicated that voters need more information about when and where to vote, the identification requirements, the availability of mobile polls in long-term care facilities, and the availability of heritage-language interpreters on election day (CRO Summary Report, 17). The importance of face-to-face communication was observed by field personnel in general (CRO Summary Report, Summary of Outreach Activities in the 41st General Election).

Several CROs noted successes, particularly in working with residents of long-term care facilities, youth and ethnocultural communities. These included providing a poll in an assisted living facility, setting up an on-campus information kiosk, and distributing the *I Can Vote!* guide as well as brochures in heritage languages. There appeared to be some difficulty working with Aboriginal and homeless electors, particularly gaining access to reserves and using the *Attestation of Residence* form (Summary of Outreach Activities in the 41st General Election).

The most notable change in the electoral process in the 41st general election was allowing certain target groups to use the voter information card, together with another piece of identification, as proof of identity and address. This initiative was applied to 5,680 polling sites across the country serving seniors' residences and long-term care facilities, Aboriginal reserves and on-campus student residences.

A high proportion of CROs felt that the VIC made voting easier, particularly for Aboriginal, youth and homeless electors (CRO Evaluation Survey, slides 37, 38, 48 and 59).

Returning officers mentioned the effectiveness of CROs and targeted revision agents working together to inform electors (especially seniors) about the VIC as proof of identify and address initiative. In general, they felt that the initiative was successful with seniors but in contrast to the views of CROs were divided about its success with youth and Aboriginal electors (Returning Officers Post-Mortem Sessions Summary, 10).

Of administrators in long-term care facilities and seniors' residences who were contacted for a survey, two thirds said that use of the VIC as proof of identity and address made the voting process easier. About 60 of the 751 respondents said that the identification process needs to be further simplified (Survey of Administrators, 2).

### **Recommendations**

- CROs should continue to collaborate with administrators in seniors' residences and long-term care facilities, post-secondary institutions, and band administrators, and to work closely with all target groups to facilitate access to, and provide information about, the electoral process.
- Face-to-face field outreach should be leveraged when introducing changes in the electoral process and communicating how, when and where to vote.
- The voter identification regime should be simplified.

### **Outreach Tools**

#### **Promotional Tools**

CROs noted the usefulness of promotional tools, including publications such as *I Can Vote!* and publications in heritage languages (Summary of Outreach Activities in the 41st General Election). Also popular were the *Need Pocket Money?* poster and fridge poetry magnets.

Some CROs mentioned issues with materials produced in heritage languages, problems with the format of materials, and the need for more materials in plain language (CRO Summary Report, 20–21; Returning Officers Post-Mortem Sessions Summary, 12).

#### **Working Tools**

To perform outreach, field staff require a support infrastructure, including a cell phone, computer and computer account, and work space. Not all CROs had access to the necessary tools. Most had to use their own phone and computer rather than devices issued by Elections Canada; they also used their own personal email accounts for correspondence. Computers in returning offices were incapable of playing two CDs developed for the use of CROs (CRO Summary Report, 21). In post-mortems, returning officers identified the need for all roles in the local Elections Canada office to have their own e-mail (Returning Officers Post-Mortem Sessions Summary, 5).

#### **New Communications Tools**

Some returning officers used social media to help recruit youth workers. The majority did not, citing lack of time as one of the main reasons. However, returning officers do suggest that there are opportunities in using social media for outreach activities to promote participation, to reach specific groups (e.g. inform young people about how and why to vote or about Elections Canada's role), and reinforce messages to election workers. Challenges with using social media include difficulty controlling content, active versus reactive messaging, competing messages, as well as the need for bilingual content. For these reasons, returning officers recommend that

social media be led by Elections Canada in Ottawa (headquarters) so that messaging is consistent, a social media policy is developed, training is provided to returning officers and others using social media, and a dedicated social media monitoring function is created because it would be too much work for returning officers (Returning Officers Post-Mortem Sessions Summary, 11).

CROs agreed with the need for Elections Canada to use and sanction the use of social media in the field, facilitated by the development of a policy and tool kit (CRO Summary Report).

### **Recommendations**

- Promotional tools should be enhanced by using plain language in all materials, tailoring content for target groups and translating more materials into various languages.
- Field staff performing outreach functions should be provided with the necessary tools, such as a computer or laptop and communications devices, to perform effectively in the role.
- Elections Canada should develop a policy on the use of social media and a social media and Web tool kit that would guide field staff in the appropriate and effective use of these new platforms.

### **Aboriginal Elder and Youth Program**

The Aboriginal Elder and Youth Program provides for Elders and youth to be appointed to work at any polling station that serves mainly Aboriginal voters, and to be present during voting hours. They offer translation services as required, help explain the voting process and answer general questions. In the 41st general election, 303 were hired to provide these services, compared to 349 in the 40th general election.

Elder and youth participants in the program were asked to complete a post election survey. Highlights of their responses include the following:

- 93 of 303 participants in the program responded (31 percent).
- 45 percent of respondents were recruited by the CRO, 17 percent by the returning officer and 14 percent by the band council.
- 90 percent of respondents thought the program were helpful in creating a welcoming environment for Aboriginal electors.
- The top two suggestions from respondents for improvement to the program were increasing awareness through more advertising and getting Elders and youth to collaborate more often.

Of the respondents to the CRO Evaluation Survey, all mentioned that the Aboriginal Elder and Youth Program was beneficial, with the highest percentage (32 percent) indicating it was an excellent program for the Aboriginal Elders. Other reasons given as to why it was beneficial:

- It allowed community members to participate in the process (14 percent).
- Voters were encouraged when interacting with familiar faces (14 percent).
- Voters felt comfortable when voting (14 percent).

Most returning officers took advantage of the program. Some said it was very helpful with targeted revision and it helped organize the information going out to band members. Others indicated that there was not enough information about the program, and not enough flexibility with hours (Returning Officers Post-Mortem Sessions Summary, 12).

### **Recommendation**

- While there were fewer participants in the program in the 41st general election, the majority of Elders, youth and CROs who were surveyed indicated that the program continues to provide benefits to the electors it serves and is well received within the community. The program should be continued and reviewed as more information becomes available through research on barriers to the electoral process experienced by Aboriginal people.



## Conclusion

According to the post-event survey of CROs, a strong percentage of respondents indicated that being a community relations officer was a positive experience that was helpful in raising awareness, and that they would participate again if they were offered the position.

Other feedback from stakeholders indicates that the face-to-face contact from Elections Canada representatives, CROs and other field staff was positive and helped target groups better understand how, when and where to vote (CRO Summary Report, Survey of Administrators).

Local outreach was an essential communications and engagement tool in the 41st general election and it should be enhanced during and between elections to support outreach to target groups and work with stakeholders to help ensure electors understand and have access to the electoral process.