



RETURNING OFFICERS POST-MORTEM SESSIONS

41st GENERAL ELECTION

Summary

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Foreword

The following is a summary of topics identified during the 13 post-mortem sessions that took place with the returning officers following the 41st General Election, a vital element of the evaluation process.

These post-mortem sessions offered returning officers an opportunity to express themselves on 8 key topics, focusing on best practices, challenges and principal issues. Open ended questions were asked, to engage participants in the discussion of various themes. The comments and recommendations collected have been thoroughly compiled in an Excel table. This summary gathers the most frequent commentaries made by returning officers in the various sessions across Canada. It should be noted that this approach was used in order to avoid creating expectations — participants were not asked to provide input in terms of specific priorities, but rather to focus on what worked, lessons learned, required improvements, and best practices.

1- Election readiness

In the first segment of the post-mortem sessions, we asked returning officers to talk to us about election readiness processes. Most ROs said that readiness went well. New assignments had been introduced in the field, and ROs said that the pre-event tasks were very successful in ensuring an adequate level of preparation (more specifically: self-training, SBC training, deployment, recruitment and GEO tasks). In the West, ROs mentioned that the RO / ARO meeting was greatly appreciated.

1.1- Readiness and Pre-event tasks

Staffing

In terms of staffing related to election readiness, ROs mentioned that they would need their key staff to start earlier. They would like to be able to identify their central poll supervisors a few months prior to the election, and some ROs also suggest that a pre-event task may be defined to identify community relation officers with enough time for training. It has been asked in some regions, that Elections Canada put in place a pre-event task in order to reach out to aboriginal band leaders sooner. In the rural West region, ROs did mention that finding recruitment officers and the CRO for seniors went well.

Offices

ROs also believe that it would be beneficial for key staff to have access to the office one week prior to the election being called, in order to set it up. It was also noted that during the election readiness period, ROs need an easier way to transfer their documents to their office computers. A pre-event task would also be needed to determine the material requirements for AARO offices.

Accessibility

ROs feel that the pre-event tasks on accessibility should have been completed much earlier, and by the returning officers; they agreed that they were not ready in terms of accessibility, and that there were not enough hours allocated on EC's part to visit the sites. As a suggestion, it was mentioned that EC should build on what Elections Ontario has done in terms of accessibility.

Geography

ROs suggest integrating the pre-event task on geography with the SITES task. They would also like the pre-event task on geography updated, as they feel there were many requests for changes to be made to the poll keys, but they were not done, and that in spite of the tasks, there were many splits and merges. ROs also suggest that the CRO - Seniors be included in the pre-event task for site identification.

Other Recommendations

Finally, ROs commented that certain pre-event tasks should be made ED specific, instead of having an "all or nothing" approach, as they do not always apply to all electoral districts. They also feel that they could have been better prepared for site identification, and they would like to have the SITES application available to them at all times. They request more flexibility to correct SITES if there are errors. As a pre-event task, ROs also mentioned that it would be important to contact school boards earlier, and that some changes to the *Canada Elections Act* may be required to give them access to schools when needed. They suggested that targeted revision be done every two years as a pre-event task, in order to keep the national register of electors (NROE) up-to-date. Finally, ROs would like to see more involvement of their AROs in the pre-event tasks.

1.2 - Opening the RO and AARO offices

When asked about the procedures for opening offices provided to them prior to the issue of the writ, ROs mentioned that 5 hours are not enough to find a returning office. EC should look into the possibility of a conditional lease, or allow ROs to sign the lease before the issue of the writ. They also requested that EC send them a landlord package that would include: the lease, terms of insurance, payment terms and accessibility requirements.

New EC lease

When asked specifically about the new lease, ROs had a lot of comments and recommendations. Among them, that it took too long to get approval from HQ for leases; that most landlords do not want to rent for 2-3 months and that they request a minimal payment of three months; and that the EC logo on the lease was a concern. They also mention that not all landlords wanted to sign the lease - they wanted to use their own; in circumstances where this is the case, the RO could use the EC lease as a schedule to the landlord version. Finally, ROs commented that errors in the lease caused some issues (for example the landlord is required to have liability insurance when it is supposed to be the tenant).

Accessibility clauses

Smaller sites are becoming less available and landlords do not want to accommodate accessibility needs; in one region, 2 ROs lost their preferred office due to accessibility clauses.

Insurance clause

Several ROs, mostly from electoral districts in Ontario, had to purchase insurance in their own name. Clauses regarding liability were confusing, and ROs request that EC be clearer on who covers what. ROs feel that they should not have to put their name on insurance, and that it should be headquarters signing the lease, or have the RO sign as an agent of EC.

Other problematic clauses in the lease

Landlords are concerned about power and heating costs being sufficient; in a single region, 9 ROs had to modify the sections regarding additional fees. Also, ROs would like landlords to receive a lump sum payment as this would avoid several calls from landlords.

Other suggestions

Finally, ROs made a few suggestions regarding lease issues. First, they need a minimum of 30 days to confirm offices, but having 4 months of readiness preparation would be ideal; for example, signing a lease in June for the October election. In one particular region, 30% of ROs use urban real estate agents already, ROs suggest that HQ approach commercial realtors to work on leases and insurance proof requirements to simplify and make leases more acceptable to landlords; in return they could get a finder's fee. Finally, when it comes to readiness and the opening of the offices, ROs feel that they should have the opportunity to review all logistical tasks close to the issue of the writ; they would prefer combining the pre-event tasks for finding an office with accessibility; and they suggest that the automation coordinator (AC) do a small pre-event exercise.

2- Administrative Services

2.1 - Office infrastructure

To discuss the themes included in the Administrative Services section of the post-mortems, the participants formed small groups.

Wireless Telephony

When asked specifically about the new wireless telephony and about IT equipment and software, most ROs said that they understood the telephone blueprint but had to make changes to suit the office; they would need more flexibility to change the assignment of phone types according to the office. A few ROs had to reassign the SBC and recruitment lines to a traditional line. ROs also add that the ARO and the reception positions should have a copper line, but that the RO should have both a land line as well as a cell phone. There is a need for better assignment for the AARO office, and they should also have a cell phone.

A lot of issues with Telular phones and their functionality were identified. Most ROs had Telular problems in regards to conference calls, dial timing, cutting out, static, the ringer being too loud, or the system not being compatible with headsets; it was also mentioned that they sometimes received interference from radio stations. Receptionists had some issues when transferring calls, and there were also some problems with 1-800 lines not working. Finally, there were problems with headset quality for all office phones.

Other

Although several ROs felt the training kit came a little too late and that they did not have enough time to familiarize themselves with it, an equal proportion of ROs said the training kit was effective. When asked who should take the responsibility of managing the telephone system in the RO office, most ROs said that it should go to the automation coordinator first, to the receptionist second, and to the ARO third. Among the functionalities ROs would require on their phone in anticipation of the 42nd General Election, the following items were mentioned: a Bluetooth for the RO and recruitment officer, voicemail both on regular lines and cell phones, call forwarding; a text messaging option; and finally, a Blackberry or iPhone for ROs, so that their e-mails can be directed to their phone until the office is set up.

Information technology

ROs mentioned that they need more software licences in their office, and also that they need to update their current software capabilities in order to be able to create PDF documents. Minor hardware problems were detected, such as having a French keyboard in an Anglophone electoral district, not enough cables, and some issues with IBM subcontractors. ROs require better Internet connection (high speed or wireless), and they need a scanner in the office. Finally, it was mentioned that the RO computer should be a laptop, that the fax in the AARO offices was decommissioned too early, and that there were some problems with passwords.

2.2 - Budgets and Expenditures

Staffing Budget

During the post-mortem sessions, there were a lot of comments, discussions and recommendations around the budget. According to ROs, for the staffing budget, the following positions need an increase both in hours and in rate of pay: recruitment officer, community relations officer program (especially the CRO – Senior), central poll supervisor (if not, then a flat rate), revision supervisor (could be a salaried role similar to the automation coordinator). There is also a need for an increase of hours in the following positions: automation coordinator, training officer, SBC, and for the financial officer for follow up time after the election. When complexity is added to a role, then the hours should be increased. And finally, more hours are needed to visit acute care hospitals.

ROs all agree that the tariff of fees table needs to be adjusted. Some functions are paid lower than minimum wage, and it was deemed that election day workers' pay is inadequate. The rate for trainees is very low, and the rate for training needs to be adjusted. Also, inventory clerks need better pay because it requires skilled people. ROs also suggest increasing pay scales for workers and staffing (with the help and support of HQ for recruitment). The pay rate for hiring people on reserves is inadequate; workers' pay gets deducted from their social security benefits.

Budget for suppliers needs to be increased: it was mentioned that \$500 to stick labels is insufficient. ROs also pointed out other insufficient budget allocations: \$90 per poll to rent polling sites in rural areas; \$90 for a registration desk; ballot printing allocation is too low (1.5 times). More money needs to be allocated for polling sites. Finally, the change in the costs for the printing of VICs was not reflected.

ROs also mentioned the need for more hours and budget for pre-event tasks, as well as hours for the appointment of staff; they note that there is a lack of flexibility in that sense. Other recommendations include an increase in the allowance to cover the cost of transportation and parking for the CRO program, and finally, that SBCs should be increased in number and cross-trained with other positions.

General comments

ROs would like to see what they actually spent after the election. ROs recommend using the budget from the previous election as a starting point; they also note that comments sent and requests for changes from the preliminary budget were not reflected in the actual budget. They should be considered more closely since there is little time during a General Election to process special requests, and they take too long. They would like to have more flexibility, for example let ROs manage their budget or give them a discretionary budget. Most ROs would prefer a more global approach in the production of the budget.

As for the training on budgets received by ECHQ, it is too short for new ROs, and it should be repeated during regional sessions. Very few ROs knew about the EXCEL budget tool, and those who did mentioned that it needed updating. ROs would like to see results of their expenditures against those of other ROs in their region. Some ROs feel that the financial officers have a lot on their plates; therefore they need more help and/or more hours. They also recommend retaining the financial officer (FO) to deal with payroll issues that arise after the event, and to keep ROPS functioning longer to help with this.

Tools or modifications to ROPS that would simplify the financial officer's job:

- Application interface should link directly to ROPS for better data integration;
- Need more passwords to ROPS (RO, FO and recruitment officer);
- Hard to communicate with other systems, externally and internally (recruitment information must be entered into a different system);
- Pre-event training (online).

Request for additional budgets:

The policy to transfer from other sources before requesting additional hours is not helpful, as it unbalances the rest of the budget; it is also not user friendly to require all hours be used up before more can be requested. Equally, some ROs felt that the treatment and approval of additional budget requests were handled in a timely manner while other ROs felt they took too long.

2.3 - Support infrastructure

For this portion of the post-mortems, the participants discussed in small groups, various topics related to the support infrastructure provided by ECHQ during the election.

Field communications - Communications - Public Folders and ECDocs

Asked to comment on the changes made to the structure and flow of the information provided to them, ROs agreed that it was better than the 40th General Election. The public folders were clearer, for example it was easier to find all the information under one heading, "41st"; but they still need more sub-headers. The search function was not easily used, the categorization of the folders needs improvement, and it is still difficult to sort through the memos. Several ROs would like to see the

documents attached to the e-mail for easy access. And they still feel that the information is placed in too many locations, it needs to be streamlined.

According to ROs, most memos were clear and concise, but some still need work on being more direct. Some memos were still too long - maybe highlighting the content in point form then adding supplemental information would be more effective. Also, it was noted that some information came too late, and that there were missed opportunities on reminders for not being sent out early enough. Several ROs still think that there are too many memos and found the information repetitive at times.

ROs want AROs to have a permanent e-mail address. They also wish that the following positions get an e-mail address: financial officer, revision supervisor, CRO and AARO. According to some ROs, all roles should have their own e-mail, and then memos that pertain to them could be sent to them directly instead of the RO having to print off a hard copy. It was pointed out that ROs do not like receiving e-mails both at the office and at home, they would like to only receive e-mails at the office address once it is opened.

Most ROs found ECDocs useful in helping them and their staff to complete their daily tasks. The search function in ECDocs is limited if you do not have the right word, and they would need more keyword search capabilities, particularly for forms. It was pointed out that there were some errors in the manual, the printed and the electronic versions were not the same.

Field communications - ECSN

Structure of the ECSN

Several ROs feel that they need a better tracking system for requests placed with the support network; some requests were lost. There should be a way to be able to check the history; and a better follow up with the e-mails is needed. Also, ROs need some say as to when the *Helpvision* ticket is removed or closed. As well, several ROs would like to have the ability to speak directly to the same person, as it would increase efficiency. Pods dedicated to support a certain group would be useful; as the same people would be taking calls for the same EDs. ROs would like to be given more opportunity to speak with a Tier 2 agent. A technical aspect that was suggested would be for ECSN to have the ability to see what is on the ROs screen. As for the *Helpvision* system itself, it was said that it is too slow and inconvenient.

Satisfaction with the support provided

It appears that ROs were not entirely satisfied with the support provided; they mentioned that Tier 1 and the SVR help lines often gave incorrect information. Some ROs felt that a sense of urgency was lacking in providing them with responses and/or approvals, and that the resolution rate at the Tier 1 level was too low.

Quality of service

In terms of quality of service, most ROs said that Tier 1 and Tier 2 have improved since the last event; Tier 1 support was kind and respectful, although they felt they lacked training, and Tier 2 was excellent. But it was noted that a lot of information was lost, such as faxes and copies of pages of the nomination papers.

Field Communications - Field Liaison Officer (FLO) program

Before the FLO program was in place, ROs had the opportunity to go to Ottawa and had more access to HQ, therefore they feel it is very important that the FLO continue to share and transfer information to ROs. They would ask of the FLO to continue with regional meetings between events. They said that their FLO should meet with them once or twice a year to exchange information and get to know each other better, that the FLOs should highlight new items from Ottawa and have Skype discussions about pre-event assignments.

ROs feel that the FLO should be their main contact instead of the helpdesk. ROs do see the mentoring role of the FLO as important, and specified that they should act as a motivator and make it a coaching relationship. The roles of the FLO and the RO need clarification and need to be better documented since ROs don't always know when to go to the FLO and when to go to EC for support. With regards to assignments, it was mentioned that EC does not always respect the role of FLO vs. RO; they are led to believe that the FLOs have the lead role, when it is the RO who is supposed to be in charge. On the other hand, some ROs suggested that the role of the FLO be enlarged, and to give them a little more decision making capability, for example, the FLOs could be authorized to approve limited funding requests.

Some ROs feel there is an increasing disconnect between the FLO and RO; originally, they were a support and resource, now they are an intermediary telling them what ECHQ needs. So, there is a need to better define the relationship between the FLO and RO - support to RO vs. support to EC, where do they fit in the picture? Some ROs felt that their FLO's role was one of reporting to HQ, not supporting them and that the FLO overstepped their bounds.

There is an issue with duplication in monitoring (why tell Ottawa and FLO the same thing, when the item is done). Micro management monitoring is a burden at times for several ROs. That said, most ROs thought that the support from the FLO was excellent, they had good presence, gave good support, and they were a sounding board for frustrations. They played a crucial role in getting doors open at HQ for RO issues and were very beneficial to new ROs.

2.4 - Regional Media Advisors (RMA) and interaction with the media

Most ROs had good cooperation with the regional media advisors. The number of regions that had direct contact with their RMA was equal to the number of those that did not. Some ROs dealt with media requests during this event; in these cases, the requests were directed to the FLOs or the ROs to provide basic factual information to the media. Most ROs said the media guidelines were clear and useful, although the process for photographing the candidates as they vote remains unclear for some.

2.5 - Information programs

Outreach

When asked what improvements could be made, ROs identified that there is a need to give out more information to electors; for example, there are not enough outreach activities and communications about where the RO office is located and on the voting process. They suggest taking out ads explaining that advance polls will be busier. Even if it was the day after, this would help ease voter complaints about long wait times. They also recommend being more proactive in informing the public about specific voting issues, and more advertisement on the Special Ballot process (it should be made into a media announcement early on). ROs are missing some publicity resources, they would like to have kits made up for smaller local media groups. In general, be more proactive and less reactive.

Recruitment

When asked about their overall impression of the recruitment support provided by Elections Canada's RMAs, ROs said they felt that they could have done more on this front, and that there were some missed opportunities. They suggest putting together a national recruitment strategy; they also suggest that the RMAs could help with a recruitment blitz 5 days prior to polling day.

3 - Human Resources Management

3.1 - New Training officer (TO) support

The discussion sessions held on the topic of human resources management gave ROs the opportunity to give feedback on the new training officer support mechanisms introduced during the 41st GE.

In Ontario and the Western provinces, very few ROs were aware of the new training officer program. ROs suggest the implementation of a better communications plan. Most ROs attended the training session provided by their training officer in their office. To them, the video presentation provided by EC was a key component; they are suggesting EC make a detailed training DVD to replace the different training sessions in the local offices. ROs mentioned that most trainers did not do the exercises and role playing during the training, mainly for lack of time.

Trainer Logistics - additional forms of support

In terms of logistics, it was mentioned that training does not flow well – it needs to be simplified, perhaps by changing the order of training. Some ROs used chronology over theme and it worked better. It was suggested that it would be good for the training officers to show the ROs what their responsibilities are in terms of the training plan. There should also be online support for the ROs, and finally, it was suggested to have 2 hour sessions instead of 3 hour sessions.

Training the RO Office Staff

Central poll supervisors need to provide more support at the opening of the polls; therefore, they should get more training. There should also be separate training for the DRO, poll clerks and CPS. Geographic realities are such, that sometimes, the RO needed additional trainers, and in a few cases these requests were denied to the RO.

Training Tools

ROs suggest having a video for the trainer himself, as well as videos and other visual aids for specific topics; also, some Web-based tools, maybe even an avatar program. ROs propose seeking suggestions from other alternative models, at the provincial level. Specifically in the rural West region, ROs suggest having all position descriptions on the EC Website in the form of a mini video. Also, they need a different training package that is revised for this specific group, since many are seniors; finally, an e-learning module was a good first attempt, and we should connect the tool to the module especially in rural areas.

3.2 - Recruitment of field personnel

Online application form

The new online application form for recruitment was very useful, and should be the primary way to apply for employment, although, it needs to be better formatted. Also, it was noted that rural postal codes caused problems for recruitment. In terms of mechanisms, ROs suggest that applicants be advised that their application has been received, and have a file number provided to them. The calibre of polling day workers was better overall than the last General Election, and better in relation to those referred by the parties.

ROs said that now that they have a recruitment tool, it might be time to rethink when and how recruitment should start. In their opinion, the recruitment officer should be allowed to start identifying resources 1 month prior to the issue of the writ. ROs would also like to receive the list of potential employees supplied by the candidates earlier (Day 28). Several ROs said that they asked all RO staff to contact staff that worked in previous elections, and also used the "Friends you want to work with" strategy, and they had great results.

Other information to be added to the form:

- Summary of electoral experience, age group, bilingualism and their full address;
- Have they already given their name to a political party;
- Need to be a Canadian Citizen to apply for this job;
- Best time to call;
- Include job descriptions and expectations.

Need Pocket Money Campaign

It was a good campaign, but it was difficult to track its success. Some ROs say that very good workers were drafted from this initiative, and they followed instructions well. Other ROs think that the timing was not good for that initiative; the pay is too small and the cheque is not a good idea. Some ROs say that the campaign was targeted towards youth too much, and it did not attract others.

The poster is too big, and because of this, there are only a few places it can be posted. There is a recommendation that the posters be integrated with the recruitment pre-event tasks, so that the posters can go up sooner. In some cases, high schools were giving credits to students who worked for the election. The posters were also used at shopping malls, campuses and in the subway.

Recruiting 16-17 year olds without requiring prior approval from Elections Canada

Yes, according to ROs, it was a very good initiative, in all regions. The CRO - Youth recruited 20% of the staff. There was a problem with some schools not letting them out for the day to work; it would be more successful if polling day were a Saturday or a Sunday. A few used this ability, but the ones who did said that they were better workers. Some ROs say it would have been useful to have permission to hire the 16 – 17 year olds prior to the issue of the writ. Finally, ROs mentioned the need to update the oath to reflect that they can be 16 years of age.

Other recruitment support initiatives for the next electoral event

The recruitment officer needs more tools and training manuals. They would like the same process and budget as revision. They suggest developing a manual on how to recruit. Also, they suggest using e-mail addresses (same) to keep track of people applying (ROPS). Other ideas are to have recruitment kiosks, and to use social media to promote hiring. In some cases, ROs mentioned that permission for hiring out of ED workers came too late, so very few people hired them.

4 – Service to Candidates

4.1 - Nomination process

Signature Requirements

The confirmation of signatures online worked well. ROs would like to see put in place a process to verify all witnesses from the electoral district; this could be done by adding a section for phone numbers next to the signatures for easier verification, moving to a system like what Purolator uses with an electronic pen, or having people text in their signature.

Nomination Papers and the submission process

The online nomination form worked well; it should be the only way this is done. Electronic receipts worked well as did the booklet for candidates. It was mentioned that Page 6 of the nomination papers is a bit complicated, and that we need to look into simplifying the documents. It was also suggested to have the candidates make appointments to submit their nomination papers at the RO office. Overall, ROs mentioned that the submission process is well documented and worked well, and that the candidate support line was very good; but there is a need for a structured method for determining the legitimacy of the nomination, for example, a better way to determine if the auditor is original, the tax receipts, the signatures, the police check, etc., all need to be verified. The process for filing electronically vs. in person needs to be clarified. ROs are having a hard time understanding the

process especially in regards to the signature of the Justice of the Peace. The role of the RO needs to be better defined in this process.

Information/Support for Candidates

ROs propose preparing a package for the candidates that would include: a properly completed witness list, information on our Web site, guidelines on how to complete nomination papers, a checklist, as well as any reminder documents that they find helpful.

4.2 - Candidate's Briefing

ROs agree that the candidate's meeting is an important way to build relationships between the RO and the candidates and their representatives, and their contact information for polling day. Most ROs mentioned that few or no candidates actually attend the briefing, and suggest considering calling it "meeting with political parties". The agenda provided by EC is useful. Some ROs said that they would need a more structured agenda so that all ROs cover the same things. It should be received earlier in the electoral calendar so that we can advise the candidates early on about the date of the meeting and agenda topics.

ROs suggest that this time be used to educate the candidates on things like procedures at the polls and other basic rules. Also, to clarify things like the Statement of the Electors Who Voted (on polling day and at the advance polls), management of complaints, recruitment of workers or any concerns they may have. The agenda should also cover the role of the RO and the RO office vs. that of the candidate. Finally, any unusual circumstances should be covered, i.e. Manitoba flooding. It would also be helpful to provide candidates and their representatives with a manual, and use the time to train their representatives, and review the Statement of the Vote (this is especially useful for new candidates). Finally, ROs mentioned that using e-mail to invite candidates worked well, and it also worked well to have the parties sign off on not providing names of poll officials during this meeting.

5 - Accessibility and Voter Information Card (VIC) as ID

5.1 - Accessibility

Accessibility - Training Delivery

Most ROs expressed that the training sessions on accessibility were fun, and the message was loud and clear. The booklet and online accessibility modules were great and the case study was useful. Some ROs specified that during training, accessibility and human rights worked really well together. It was also mentioned that the regional meeting was useful as it set the context and hinted at the upcoming workload. On the other hand, some ROs mentioned that the training was overkill – too much information in too little time. They suggest reviewing the timing, that this all came too late and caused a lot of stress for them. Finally, it was suggested that the booklets be updated and more detailed.

Accessibility - Verification Visit to Polling Locations

ROs found the accessibility verification visit to the polling locations during the week prior to polling day very useful and helpful in mitigating any potential problems. Some ROs mentioned that it made the deputy returning officer (DRO) and the central poll supervisor (CPS) more responsible and conscious of accessibility issues. Most ROs agreed that the timeframe was too short. It could have been done a little sooner to give the landlord time to fix any problems, and it should have been made into a pre-event task. ROs also suggest that the verification be done by the RO, and not the CPS.

Availability of level access in some communities was limited, and it poses a problem with "reasonable" location. It was identified that there was not always enough space to build a ramp according to the building code, and that many owners will not renovate their building, or the building

was accessible but the street and/or parking lot was gravel. It is important to verify the site before the lease is signed, but some ROs felt that sometimes getting access to the site was difficult. In rural settings, the RO often has to rely on town administrators to determine accessibility because they cannot visit all the sites. ROs do suggest that where possible, the same team be sent out to check the facilities. Pre-event accessibility tasks should be done within the same year as the event, it should include a documented formal floor plan of each site, and the RO must visit each site to verify accessibility.

Accessibility - Verification Logs

For the most part, accessibility issues raised at the advance polls were corrected for ordinary polling day. However, in some cases, ROs had trouble correcting problems because the CPS did not give the log to the RO; it is important to talk to the CPS to make sure that they are providing the RO with information on all the issues, not just the ones on the log.

Accessibility - Feedback Process

Most ROs feel they were provided with more than enough supplies, feedback forms and feedback boxes for the Accessibility Feedback process. They even say there were too many forms, and too many copies of the manual. They do not feel they need a new feedback box every day, but they do need more signs, and a different variety; for example signs that you may peel and stick in windows.

Data entry into the Incidents, Complaints Breach Monitoring System (ICBMS)

Some ROs were able to use available staff to do the data entry of the accessibility feedback forms into ICBMS immediately following the advance polls and polling day. Some ROs, say they were not able to, because ICBMS was too complicated to navigate. The majority of ROs commented that most feedback on the feedback forms was not related to accessibility. There were complaints regarding new sites, long waits, etc. The forms not related to accessibility should be put aside, and EC should send instructions to that effect.

Follow-up with electors requesting feedback

When it comes to follow-up with electors requesting feedback from EC, most ROs mention that they did it themselves, and in some cases they delegated the task to the ARO.

5.2 - VIC as proof of address

Determining polling locations

Some ROs mentioned that there were no problems determining polling locations, since it was a pre-event task. Other ROs found it was problematic when other electors came to vote in seniors' residences. It seemed to be a problem also in the North where there were large aboriginal communities or in areas with electors living across the street from reserves and wanting to use the VIC as ID since they received the pamphlet in schools.

The Use of CRO and Targeted Revision Agent

Using community relations officers and the targeted revision agents to inform electors was an effective communication strategy, mostly with seniors. Some ROs mentioned that it was not an effective strategy with youth or aboriginals, and they felt they still had problems with the general population showing up with the VIC as ID.

Three Target Groups

Using the VIC as proof of address was useful for seniors, especially in rural areas. Administrators in the seniors' residences were very grateful for this initiative. Some ROs say it worked well with aboriginal electors, other say it did not work so well. In the far North specifically, it does not work with aboriginals due to geographic dispersion. In the NWT, often homes do not have a physical

number, some reserves get their mail at a PO Box, and these pose challenges. Finally, source data for First Nations is low, so the VICs are hard to produce. For some ROs it worked well for students, for others it was hard to tell, as it was the end of the year and most students were gone. Some ROs mentioned that using the VIC as proof of residence makes things go much faster at the polls. Finally, some ROs suggest that if we are going to use the VIC as proof of residence, then it should be done across the board.

6 - Outreach

6.1 - Use of Social Media

ROs had limited, or no use of social media and one of the reasons for this is a lack of time to use it. Facebook, Kijiji and Twitter were used by some ROs to recruit youth workers; ROs do suggest that social media be used for youth outreach as an opportunity to teach young people how and why to vote, and to inform them on what Elections Canada does. Some ROs used their personal blackberry to track Facebook (candidates' pages and blogs). In general, ROs seemed to agree that there are great opportunities in the use of social media for outreach activities, to promote participation, to target specific groups, and to reinforce messages to workers, for example. A challenge that was identified is that social media is difficult to control in terms of content, and there are the challenges of action vs. reaction, competing messages and competition with political parties, as well as the need to have bilingual content. They recommend having social media handled through HQ so that the message is consistent, and have EC develop a policy on usage. Finally, ROs would need training on social media. They also suggest having a person dedicated to the monitoring of social media, because it would be too much work for the RO.

6.2 - Community Relations Officer (CRO) Program

ROs believe that the CROs are good to generate contact with people/groups in the electoral district; they used them to help get youth involved in the election process. They were a very good help with recruiting, and played a complementary role in the revision process. It is definitely a value added program. When asked what worked well with the program, some ROs say that CROs for Senior and Youth were the most beneficial. On the other hand, some ROs mentioned that they had difficulty finding a CRO to hire. Also, there is not enough time before the event to pick the right person for the position.

The CRO for Aboriginals made a difference in the aboriginal voter turnout and in the number of workers hired. But relationships with the reserves need to be developed prior to the election as it is a complex area. It is difficult to have access to reserves, and separate approaches are needed with each aboriginal group. In some EDs that have more than 20 reserves, 36 days is not enough for outreach activities.

ROs identified a need for better outreach material, especially for seniors, as well as better training modules, such as self-training modules for the CROs for seniors, homeless and aboriginals. ROs would like to have more freedom to designate what they need in terms of CROs, since not all EDs are the same. Some ROs suggest having EC prepare an outreach kit that the RO could order according to their needs, and have the ability to order the materials and quantity of materials that are appropriate for their ED. ROs also offer the following suggestions for improvements: faster shipment of brochures and pamphlets; provide information material in many different languages; and do outreach with youth between electoral events, especially in schools where there are many immigrants. Finally, ROs suggest creating the following CRO positions depending on the needs of the ED: CROs for different ethno cultural groups, accessibility, the homeless and a CRO for electors with mental health related needs.

New CRO - Senior position

ROs thought that the newly created position was excellent, as it gave them easy access to a target group. It provided them with great communications links to seniors' buildings, and the administration personnel appreciated having a contact person. They would like to see this program maintained. CROs took the time to look for people who may have been overlooked; it allowed for more personalized service, and there was ample time to organize – the pre-event task was appreciated. The kiosks in the malls worked well.

Most ROs mentioned that they need more print resources that are locally specific, multilingual and use plain text (for residences). ROs would like to have material that demonstrates opportunities for seniors to vote, they feel that seniors do not get enough information on the voting process, etc. Also, the CRO - Seniors should have their own manual, and better training and coaching material. Some ROs suggest making a team out of the CRO - Senior, the revision supervisor/agent and the SBC. It would also be helpful to involve the CRO - Senior in mobile poll training sessions to assist and provide tips.

Promotional tools available for CROs

According to ROs, most of the promotional material was good; the bookmarks were the most popular. ROs mentioned that they need smaller posters and tools in additional languages, ED specific according to the ethnic population. Some ROs specified that the *I Can Vote* poster was well used, that the *Voting is Easy* poster was very good, and that the ID Requirement poster was very popular. Some say that the posters contained the key information; others say that the messages need to be clearer.

The new products developed for the 41st GE were well received by ROs; some mentioned that the bookmarks and information cards were very useful. For some ROs, the magnets were useful and well received; for other ROs less so. In some cases, it was mentioned that some of the material received was not appropriate for their ED; as a pre-event task, ROs should be allowed to identify the quantity of each product they want to receive. Many felt they received too much material, especially too many magnets and bookmarks. In terms of promotional tools, it was mentioned by some that Elections Canada's objectives are not clear, and that HQ needs to send clearer instructions as to the use of the material. ROs suggest that they should be briefed about the availability of all promotional tools, and to include the ROs when developing new tools.

Outreach function in the RO Office

For some ROs, the roles and responsibilities of the CRO are clear, but for other ROs, the roles of the CRO, recruitment and revision positions are not always clear; there is overlap between Revision and CROs. Often, interpretation is up to the RO in each ED; the roles became clearer during the process, but ROs did not have enough info/training on the various roles at the beginning. ROs want cooperation, not consolidation of the roles. The Revision Supervisor and CRO have gone out in teams; this would be very effective when visiting senior's residences. It is also mentioned that the CRO - Senior could work with the SBC to distribute information, assist in the completion of application forms and provide voting kits in senior's residences.

Most ROs took advantage of the Aboriginal, Elder and Youth Program. Some say it was very helpful with targeted revision; it helped organize the information going out to band members; others say there was not enough information on it, and not enough flexibility with hours. Outreach should be ongoing between elections, to mobilize electors now. It was also suggested that EC work with schools and teachers more between events: hold mock elections, find ways to incorporate knowledge of the electoral process into the curriculum, work opportunities for youth prior to event; etc. It was also mentioned that it would be good to do outreach to political parties before the election - a CRO position for relations with political parties could be created. Political parties encourage seniors to vote at the advance polls so they all show up on the first day, resulting in long line ups - during our outreach, we need to remind seniors that there is more than one day of advance polls.

Outreach Progression Report

ROs found this tool easy to use as long as it was completed on a Wednesday. They suggest reviewing the frequency that they have to complete it, perhaps make it one report at the end of the event. They also mentioned allowing a more flexible timeline for completion, or make it due at the end of the week. They suggest including a section for general comments where CROs can provide feedback on the program. They recommend allowing for the attachment of photos or other documents, and to create a section that would permit them to add contacts (universities, etc). They also think the questions were too repetitive. Some ROs are wondering why the outreach progression report could not be integrated with the event management system (EMS); others would like to see some deliverables identified to be measured; finally others suggest having more input by the CRO in the report. ROs feel that the tool creates a great opportunity to sit down with the CRO and review how the program is working; it encourages accountability. While it adds to the workload for the RO, it does give a bird's eye view of what is happening in the field.

7 - Voting Services

7.1 - Advance polls

A high voter turnout was a reality for most ROs, significant enough that there were many complaints about wait times. To improve the flow when it is busy, ROs suggest putting a single signature line on the list of electors instead of having the electors write too much information. Or better yet, abolish it altogether, and omit signatures. They also suggest being able to split polls to reduce line-ups and speed up the voting process; and having a laptop at the polls so that you can split the lists as needed.

Most ROs followed the recommendations for additional staff at advance polls, and it was of use; the extra poll clerk helped, and having a CPS in each advance poll was great; it was easy to get staff. But the process at the advance polls is too long and time consuming, resulting in a lot of complaints.

7.2 - Opening and Closing of the polls

The overall opening of the polls went well, and it was mentioned that the orientation material with pictures was very useful. Some ROs mentioned that the closing documents are good, but in terms of the process, it is too complicated and too late; there is too much paperwork. ROs recommend simplifying the process: reducing the number of envelopes and questionnaires; using colour coded envelopes would be helpful.

It was also said that the quality of work at closing is poor: ROs suggest looking at the results and material and then get together to find processes that can be put in place to improve the quality of work. Counting of the votes should start sooner than 9:30 p.m. and they ask to review the closing procedures and to eliminate unnecessary steps. The consistency of the message on the poster for closing procedures with the instructions given needs work.

7.3 - Geography products

ROs mentioned that almost all GEO products are necessary and useful, and that there is still a need for them. The poll key was much more accurate this time, the overview maps were good and the maps in general are more accurate. Some ROs mention that they did not use this tool, because it was difficult to find streets; certain streets were not properly classified in the poll key. Also, they mention that it is frustrating when changes made are not reflected on the maps. They suggest adding one more box for street direction NW, NE. Also, there is a need for more details on the map: make polling division boundaries and the roads more visible, add the town names, Hutterite communities and Indian reserves, for example. Finally, maps for urban areas should identify polling divisions with advance

polls. Since many cell maps are not used, ROs suggest getting rid of some, and make this a pre-event task to give the opportunity to update and choose maps. It was mentioned that along with the GEO products, other mapping sites were used, the most popular one was Google maps.

8- Special Voting Rules

8.1 - Special ballot coordinator (SBC) Self-training – pre-writ task

Returning officers all agreed that having some special ballot coordinators trained prior to the opening of the office was very useful and beneficial. They were able to assist in the office setup, and were better prepared to deal with electors upon the opening of the RO office, since once the writ is dropped there is no time for training. This task should definitely be repeated for the next General Election. The self-training also allowed for identification of strengths and weaknesses, and it gives time to correct weaknesses, permitting the SBC to get good results on tests, and resulting in a reduction in errors and more confidence on the part of the SBC. It was also very useful for ROs without experience and a good refresher for those with experience, they recommended that other positions in the RO office be trained in the same manner (include all SBCs if more than two, ARO and AARO).

There is a strong recommendation to develop more Web-based training, and more tools like a manual, tests to be completed and a checklist for the SBCs. It is suggested that this task be done one month in advance, so it is important to ensure that all tools are sent in a timely manner.

Special ballot process in local EC offices

The self training tools worked really well, as did the cross training of duties. The checklist was good, and some ROs would like one for hospital voting.

There is a need to improve the interaction between SVR and revision; having the SBC office next to the revision office worked really well, as did having the revision agent fill out the forms for the special ballot. Some ROs suggest that the process be extended and available at the office until polling day. Returning officers feel there is a need to better define what criteria determine the need for home visits, and screen carefully those who request it - which is especially difficult when it is a family member making the request. For home visits, tough time constraints need to be respected and geography is a challenge, as is traffic, parking, and ferry scheduling. A good solution would be to do it around shift changes, to save hours and time.

Most ROs say that they used the printable list of candidates from the Website to ensure that a correct list was available to SVR electors. ROs mention that, sometimes, there were difficulties in finding the correct ED for rural addresses; there were also concerns with having the correct address and postal code as the Website postal code search is not always accurate. For ROs, training is a key element to ensuring that an application form is completed in full.

Voting by Special Ballot for electors in acute care hospitals

The training went well for hospital SBCs, and the manuals were a great help. There was a good collaboration with administrators and outreach was successful. Some ROs mentioned that it is a challenge when the patient is not in the room, or sleeping when the SBC passes by. Another challenge was that there were an insufficient number of teams to go into large facilities. ROs mentioned that for the guide and street indexes, there is too much material to carry, and they are heavy. Some ROs did not use them and called the revision desk in the office instead. Others used a cart or a rolling suitcase to carry the material. A suggestion would be to have the information put on a laptop.