

## **ES3 Plan and administer a canvass in order to gather information for the electoral register**

### **Unit Summary**

#### **What is the unit about?**

This unit covers the competences required to plan and oversee a canvass, whether it be one conducted on an annual or periodic basis. In essence it describes a project management approach whereby aims, objectives and approaches are determined, risks are identified and managed, resources deployed, and monitoring and review undertaken. The aim is to ensure that the canvass is carried out efficiently and effectively and within the prescribed timescale. Note that this unit supports the new ERO duties set out in Section 9 of the EA Act 2006.

#### **Who is the unit for?**

This unit is appropriate to the work of Electoral Registration Officers, Electoral Administrators and Area Electoral Officers (Northern Ireland).

#### **Links with other units**

This unit links with the following units:

- ES18 – Recruit, brief and deploy staff for electoral services
- ES19 – Establish, maintain and develop effective working relationships with stakeholders in electoral services
- 304 – Procure products and services
- 404 – Manage contracts
- E1 – Manage a budget
- F1 – Manage a project
- E6 – Ensure health and safety requirements are met in your area of responsibility

#### **Scope of the unit**

This unit covers the following types of **canvass**:

- Annual
- Periodic

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### **Outcomes of Effective Performance**

#### ***Planning the canvass***

*You must be able to:*

1. agree the aims and objectives of the **canvass**, and confirm the timescales within which the **canvass** must be conducted
2. evaluate the various methods by which the **canvass** can be conducted and select those most appropriate to the agreed aims and objectives
3. assess the risks associated with the planned **canvass**, and take the appropriate action to minimise or manage these risks
4. ensure that an appropriate number of canvassers have been recruited where they are required to fulfil **canvass** and organisational requirements
5. liaise effectively with suppliers to ensure provision of all necessary printing and distribution services
6. arrange for the timely production and distribution of registration forms
7. liaise effectively with staff in other organisations where they contribute information and data relevant to the **canvass**
8. respond fully and promptly to enquiries or queries relating to the **canvass**

#### ***Administering the canvass***

*You must be able to:*

9. monitor the effectiveness of the distribution of registration forms and take the necessary action to correct any deficits
10. issue timely reminders to households that confirm the timescales for return of completed registration forms
11. ensure that canvassers are appropriately trained and briefed before commencing their work
12. allocate properties to canvassers, and take steps to maintain their health, safety and security where they visit households
13. monitor the work of canvassers, undertake periodic quality checks to ensure that the **canvass** is progressing as required, and take appropriate action where there are concerns
14. take the appropriate action to follow-up with non-responding households
15. review and update **canvass** information on an on-going basis

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### **Knowledge and understanding**

*You need to know and understand the following:*

#### ***Legislation, policy and practice***

- K1. relevant legislation, codes of practice and guidance relating to canvassing
- K2. any relevant organisational policies and procedures relating to canvassing
- K3. your role, responsibilities and authority relating to planning and administering a canvass
- K4. the role, responsibility and authority of others relating to canvassing
- K5. the overall aims and objectives of the canvass, and the timescales within which it must be conducted

#### ***Planning the canvass***

- K6. the range of methods by which a canvass can be conducted; the importance of evaluating these and selecting those most appropriate
- K7. the range of risks associated with canvassing; how to assess and manage/minimise these risks; the importance of conducting a risk assessment
- K8. the number of canvassers that may be required, and methods for ensuring that they have been recruited properly
- K9. the types of suppliers with whom you will need to liaise in order to ensure provision of all necessary printing and distribution services; how to liaise with them effectively
- K10. the timescales within which registration forms must be produced and distributed, and how to ensure that these are met
- K11. the range of organisations that contribute information and data relevant to the canvass; how to liaise with them effectively
- K12. the importance of responding fully and promptly to enquiries or queries relating to the canvass, from individuals internal and external to your organisation

#### ***Administering the canvass***

- K13. how to monitor the effectiveness of the distribution of registration forms, and the actions to take where deficits must be corrected
- K14. the most effective and efficient ways in which to issue reminders to households
- K15. the importance of ensuring that all canvassers are appropriately trained and briefed before commencing work
- K16. how to allocate properties to canvassers such that all areas are covered
- K17. the health, safety and security issues that may be faced by canvassers, and the action to take where there are concerns
- K18. how to monitor the work of canvassers and conduct quality checks; the action to take where there are concerns, including the need for re-allocation
- K19. the range of ways in which it is possible to follow-up with non-responding households; how to select an appropriate method
- K20. the circumstances in which it may be appropriate to prosecute individuals for non-return
- K21. the importance of reviewing and updating canvass information on an on-going basis