

Canvass Reform Focus Day - Write Up



Dear all,

Thank you to all of those who made the journey to Birmingham on Monday 9 September to attend the Canvass Reform Focus Day. It was great to see so many of you there and to be given the opportunity to hear your thoughts on canvass reform in person.

For those of you who couldn't make the day - and for anyone who did and would like a recap - we have pulled together some key information from the day:

- The rules for Route 2 mean that there are 26 possible options (permutations) for your three minimum contact methods within the chasing cycle.
- Electoral administrators that choose to use telephone or e-communications within this route will also have to choose a property only permutation for households where they do not hold the relevant contact details.
- There will be the right funding in place for LAs/VJBs the next financial year, either through upfront grants or through the Justification Led Bid (JLB) process.
- If a general election is called, stakeholders will communicate an adjusted timetable for canvass reform work, should one be required.
- The Electoral Commission will share a full suite of canvass reform guidance by March 2020, in a new online format that will be easier to use while retaining the benefits of the current guidance format.
- The Commission will also have a full suite of voter materials in place for April 2020 that will be easy for the public to use and easy for electoral services teams to administer.
- Electoral administrators can use Notify - a custom-built communication service designed for the public sector - to send out emails and texts within the canvass process. Emails can be sent free of charge via Notify and your first 25,000 text messages are also free.

We have also created summaries of each of the talks, which can be accessed by clicking the relevant links below.

Finally, we would like to say a huge thank you to the speakers for their useful insights on the day.

With best wishes,

The AEA and the Cabinet Office Canvass Reform Team

Links to the summaries of the talks

- [Welcome Address - Peter Stanyon \(AEA\)](#)
- [Opening Chair's Remarks - Rob Curtis \(AEA and Tower Hamlets\)](#)
- [Policy and Implementation - Sarah Ling \(Cabinet Office\)](#)
- [Introducing the Canvass Reform Champions - Rob Curtis \(AEA and Tower Hamlets\)](#)
- [Supporting EROs to Implement and Deliver Canvass Reform - Ailsa Irvine \(The Electoral Commission\)](#)
- [Preparing for the Reformed Canvass - Laura Lock \(AEA\) and Pete Wildman \(SAA\)](#)
- [AEA EGM](#)
- [Peter Stanyon \(AEA\)](#)
- [Declaration Times - Tim Burke \(BBC\)](#)
- [Local Authority Case Studies - Liz Read \(Coventry City Council\), Tom Benson \(South Lakeland District Council\) and Susan Findley \(Glasgow City Council\)](#)
- [Using Notify - Sacha Zarb \(Government Digital Service\)](#)
- [Q&A from the day, including a Panel Discussion with Sarah Ling, Laura Lock, Pete Wildman, Rhys George \(AEA Branch Chair for Wales\) and Ailsa Irvine](#)
- [Chair's Closing Remarks - Rob Curtis \(AEA and Tower Hamlets\)](#)
- [Close of Conference - James Stevens \(AEA\)](#)

Welcome Address - Peter Stanyon, Chief Executive, AEA

- Welcome to the Canvass Reform Focus Day.
- The AEA had been fortunate to work with the Cabinet Office, Scottish Assessors Association (SAA) and the Electoral Commission on the policy making of canvass reform, which will modernise the canvass process in line with other innovations, such as the introduction of IER.

Chair's Opening Remarks - Rob Curtis, Chairman, AEA

- Today is 'your day' - make the most of the opportunity, consider canvass reform, and ask questions and support the exhibitors.

Question:	Do you think you will be able to deliver canvass reform in July 2020?	
Answers:	Yes 85%	No 14.8%

Policy and Implementation - Sarah Ling, Head of Business Change and Implementation, Cabinet Office



Route 2

- There are 26 different possible options (permutations) for your three minimum contact methods within a Route 2 chasing cycle, which must follow some specific rules:
 - EROs are required to send a minimum of three contact attempts.
 - In order to make sure your first Route 2 contact is definitely directed at the right property, the first contact you make must be either a household visit or a paper communication (a Canvass Form or Canvass Communication B).
 - A further contact in the process must also be made with the property rather than using individual contact details.
 - A personal canvass is required at at least one part of the chasing cycle, if no response has been received.
 - The prescribed Canvass Form must be sent at some point in the cycle, along with a prepaid, pre-addressed envelope.
- If you choose to include telephone or e-communications as your preferred permutation, you will have to also choose a property only permutation for those households where you do not hold telephone/contact details.
- You can choose to continue using the same contact methods as you currently use (e.g. form, form, household visit).

Funding

- We do not expect you to realise the full benefits of canvass reform in year one, but we would expect the benefits to be realised over the next few years.
- There will be the right funding in place for you in the next financial year, either through upfront grants or through the JLB process. We are currently working out the best approach to take.

Plans Going Forward

- We are due to lay the UK Parliamentary Statutory Instrument (SI) on 14 October, committee debates should be scheduled in November and the new SI should be passed into law by the end of the year.

- The Welsh and Scottish SIs will be laid after the UK one as they rely on the UK SI to function.
- There are too many variables to outline what the exact timetable would be for canvass reform if there is a general election. The date of a potential election would be a key consideration for us to consider.
- We will communicate any updates with you as soon as we can.

Introducing the Canvass Reform Champions - Rob Curtis, Chairman, AEA



- Being a Canvass Reform Champion includes a whole range of opportunities and responsibilities, such as acting as a conduit between the Cabinet Office and AEA branch members and understanding the changes to the canvass in full.
- Overall, it is a significant commitment from volunteers to help implement canvass reform who have agreed to do all this work on top of the day job.
- For this reason, I would like to say a huge thank you to the Champions for their efforts on behalf of everyone here.

Branch Canvass Reform Champions

Branch	Champions	Branch	Champions
Eastern	Jo Cox (South Cambridgeshire)	South West	Olivia Maybank (Bristol)
	Tom Henry (Norwich)		Sarah Dalby (Cotswold)
	Edward McCreadie (Chelmsford)		Samantha Usher (North Somerset)
East Midlands	James Hartshorn (Derby)	Southern	Lianne Richards (East Hants)
	Jane Lyons (Daventry)		Matt Box (Swindon)
London	Rob Curtis (Tower Hamlets)		Sam Whitcher (Wokingham)
	Martha Matheou (Sutton)	Wales	Lynn Phillips (Flintshire)
North East & Yorkshire	Stephen Davis (Sunderland)		Dylan Price (Carmarthen)
	Simon Copley (Ryedale)		Clare Sim (Neath Port Talbot)

North West	Elisa Love (St Helens)	West Midlands	Rebecca Light (Vale of Glamorgan)
	Gulderen Harwood (Stockport)		Victoria Beavon (Birmingham)
	Karen Fox (Manchester)		Melissa Bassett (Bromsgrove and Redditch)
Scotland	Kate Crawford (Renfrewshire)		Alice Revans (Bromsgrove and Redditch)
South East	Alex Mammous (Elmbridge)		
	Tracey Pannett (Lewes and Eastbourne)		
	Alan Widnall (Folkestone and Hythe)		

Supporting EROs to Implement and Deliver Canvass Reform - Ailsa Irvine,
Director of Electoral Administration and Guidance, Electoral Commission

- The Electoral Commission (EC) strongly supports canvass reform and views it as the first in a number of steps to make sure electoral registration keeps pace with our modern lives.
- We will share a full suite of canvass reform guidance by March 2020, in a new online format that will be easier to use while retaining the benefits of the current guidance format, such as being easy to print.
- We are developing new performance standards that are being designed to enable electoral administrators to inform and improve their work, demonstrating how work such as the reformed canvass is contributing to the provision of an effective registration service.
- The EC will have a full suite of voter materials in place for the April 2020 that will be easy for the public to use and easy for electoral services teams to administer.
- The consultation on voter materials will take place in September and October 2019. The feedback that we have received so far is that the voter materials should be as simple as possible, drive online responses wherever possible and reduce confusion between the canvass and the registration process.



Preparing for the Reformed Canvass - Laura Lock, Deputy Chief Executive, AEA
and Pete Wildman, Chair, SAA

Laura Lock

- In order to make the maximum potential savings in both time and money there is a need for 'e-methods' of communications and a drive towards channel shift.

To achieve the full benefits of canvass reform there are several steps that need to be carried out:

- Data Test – this is scheduled to take place in January and will allow you to find out how many properties are likely to be sent down each route under canvass reform.
- Local Data – it is imperative that work is done to access key data. The National Data Match being run through DWP is a data matching process only but there needs to be data mining and this can only be done using local datasets. There is a need to ensure attainers are not missed from the system – work with education teams to access school records.
- Joined Up Working - there is a difference between getting data and getting people to help you, for example when someone phones the call centre to say they have moved, can the call centre collect information on behalf of the ERO? Can those doing outreach work give out discretionary HEFs?
- Volumes – use the data test and look at CLR and think about how much work you can realistically do to improve the match rate. Speak with printers – are you in a contract on volumes – how much will volumes impact any postage discounts? Think about how you use canvassers – will the Route 2s be those who don't respond usually? Will you have significantly less properties? Will you be moving any properties from Route 1 to Route 2 based on areas of significant churn/local issues etc.
- Timescales – You can use local data before or after the national match – will you? How much time will you leave to undertake matching? Will you start earlier than you have done in the past or later? If you are using e-communications (e-comms) how much time will you give for a response? You'll have more time to focus on Route 2 – but also have a lot more complexity in stages in the process.
- Contact Methods - Route 1 starts with an optional e-comms. If you do not receive a response or do not wish to use e-comms, then the form you will use in this route is Canvass Communication A (CCA). Will you be using e-comms? Will you send a reminder e-comm? CCA can include a prepaid response envelope but it is not required – will you include one? How will you assess your level of confidence about the volume of changes from Route 1? How prepared are your electorate for channel shift? Is this consistent across your Local Authority? Route 2 allows e-comms, phone and paper comms. What order will you do things in? Your first contact attempt must be with the property as either a paper contact or household visit – remember you are not sure the registered electors are still there – that is why. How many people do you hold phone numbers and email addresses for? Can you access council records to improve the contact details you hold? Who is going to make these calls? Will you ask your call centre for help? Will you have the capacity to use the core team?

You do not need to implement every element of canvass reform in year one. Year one can simply be writing to Route 1 properties and putting all other properties down Route 2 using the same processes as now. People should not be worried about taking this approach.

Pete Wildman

It is important to work with stakeholders. The advantages help to promote registration and give access to more data sources.

- In Scotland the main partnerships have been with universities, care homes and schools.
- Developing these partnerships requires patience – it is not a quick process. Build up rapport to help obtain data sharing agreements.
- Don't think of Regulation 23 as a stick to enforce but an enabler to allow other stakeholders to share.
- It is important that data matching is accurate so that only the correct properties go down Route 1.
- Make sure to consider additions to the register. There will be properties where everyone matches so the property goes down Route 1. This is correct, but what if there is a new person at the property? This will be a particular issue for Scotland & Wales in 2020.
- Sensible to consider supplementing the data matches with year-round data mining if you are not already doing so.
- Factors to consider include the level of churn in your area and what data sources are available to you.
- Consider the effect of elections and how these will boost registration.
- Everyone will have to make their own assessment of the risks of not doing year-round work versus the resources this requires. Worst case scenario is being overwhelmed at an electoral event.

Question:	Will you do the data test regardless of when legislation comes in force?	
Answers:	Yes 84.8%	No 15.2%

Question:	Are you currently data mining year-round?	
Answers:	Yes 59.3%	No 40.7%

Question:	Are you planning to increase your data mining in 2020?	
Answers:	Yes, but we are still struggling to access data sources	65.2%
	Yes, and we have agreements with data holders	15.1%
	No	19.6%

Question:	Do you think you will be able to access education records to enable data mining of attainers	
Answers:	Yes 40.5%	No 59.5%

Question:	What do you believe is the biggest risk to being able to deliver canvass reform in 2020?	
Answers:	Legislation timetable	47.9%
	Forms and guidance	10.4%
	Electoral Management Software (EMS)	8.6%
	ERO resources	33.1%

AEA Extraordinary General Meeting

The minutes for the AEA EGM are available [here](#).

Election During Canvass Period - Peter Stanyon, Chief Executive, AEA

There is no blueprint on how to cope should an election be held during the canvass period. A lot will depend on where you are in your own canvass:

- National upsurge in registration applications.
- Significant number of duplicate registrations.
- EC will issue guidance on managing your HEFs, ITRs, monthly updates and publication of the revised register.
- Accelerate all you can - consider additional messaging regarding ITRs.
- Overseas electors – contact them now to advise them that their postal vote may arrive too late to be counted as there is likely to be a flat 25-day timetable – consider appointing a proxy.
- Do you defer publication of your revised register to 1 February if there is an election in the canvass period? You can still publish October and November monthly notices of alteration giving the option of February publication at a later stage.
- Pros and cons regarding 1 February publication – implications on postal vote refresh. Polling places review to be done by February next year, plus local government boundary changes.
- You do not need to make a decision at this stage.

The AEA and the EC are already planning for a potential UK Parliamentary General Election. The EC guidance is ready to go. AEA are meeting with the EC and meeting with the Cabinet Office in relation to fees and charges and the needs for MRAs to be known sooner than they were at the European Parliamentary elections. Overall, the AEA are here to support our members.

Declaration Times - Tim Burke Editor, BBC News

- It is important that his team have the right TV cameras set up in the right places to properly tell the story of election night.
- Make sure to let Tim know what your estimated declaration time will be in the event that a general election is called.
- Overall, the work Tim's team do is about doing the same thing as electoral administrators - delivering accurate results of the democratic process.

Local Authority Case Studies



Liz Read, Electoral Services Manager, Coventry City Council

Key considerations when beginning the 2017 email pilot:

- Email addresses – what email addresses do we hold?
- Data sharing – use the local authority online accounts/portals so that you can get access to email addresses.
- Quality of data – allow time to cleanse data.
- Factor in that you may have multiple email addresses for properties.
- Whose email address - all or first person? (Note that under canvass reform, if you wish to email as a contact method, you must use all the email addresses that you hold for matched electors at the property.)

Key considerations when you are ready to send the emails:

- How to write the email – impersonal phrases like 'Dear Occupier' are less likely to lead to interactions.
- Who will send the email – large volumes of emails can cause issues internally. Consider other providers.
- What email address does it come from?
- Spam – make sure there is a web address localauthority.gov.uk with a link in the email or words to allow google search i.e. local authority annual canvass.
- Wording of email – ensure worded in the correct way. (Note that the Electoral Commission are designing a Canvass Email as part of their work to update voter materials.)

Conclusions:

- Bouncebacks – ensure you track these.
- Be ready to manage queries.
- Be prepared for the email only going to a younger member of a household, leading to questions from parents about their lack of email.
- Important to review email data.
- Consider the implications on workload.

Tom Benson, Electoral Services Manager, South Lakeland District Council

- When conducting the annual canvass pilots in 2016 and 2017 using the data discernment model, it was hard to obtain attainer data, plus second homes were an issue.
- In 2016, we only had council tax data to use, which didn't include UPRN numbers. In the first year there was a 62% original match rate, which rose to 67% with manual data matching. In the second year, the change was from 64% up to 68% after manual data matching.

Susan Findlay, Deputy ERO & Principal Surveyor, Glasgow City Council

- Conducted an annual canvass pilot in 2017 using data discernment.
- Glasgow is the biggest city in Scotland, the most ethnically diverse, has the largest Scottish student population and is home to some of Scotland's most vulnerable citizens.
- The primary data source used was Council Tax, with secondary sources including the previous year's HEF response and education data.

The data matching process involved:

- Custom-built data matching system outside EMS.
- Household Composition based on number of electors.
- Assigning the following route based on the matching score:
 - All electors matched - HNL
 - No electors matched – HEF
 - Partial match – proceed to a secondary data match

84.6% received an HNL and 15.4% received a HEF.

The conclusions of this pilot:

- You can realise significant savings by using data matching.
- You can better align resources.
- A better process improved staff morale.
- It improved the elector journey.

Using Notify - Sacha Zarb, Commons Platforms Engagement Team, Government Digital Service

- Notify is a custom-built service designed to enable the public sector to send emails, texts and letters. Electoral services teams can use it to send out communications within the canvass process.

- Features include:
 - No contract beyond a 30-day MoU with GDS.
 - Personalisation, such as including Local Authority branding.
 - Use of local email domain, with emails being sent via a GOV.UK domain so few get blocked.
 - Option for simple use of for it can be built into your API.
 - Dashboard displaying what you have sent/received.
 - Templates.
 - Ability to control different team members' level of access to the functions.
- Local Authorities can send 25,000 free text messages (1.8p per text thereafter) and all emails free of charge. Letters are sent out first class at 56p+VAT.

Canvass Reform Focus Day - Q&As from the Day

Including the Panel Discussion with:

- Sarah Ling, Head of Business Change and Implementation, Cabinet Office
- Laura Lock, Deputy Chief Executive, AEA
- Pete Wildman, Chair, SAA
- Rhys George, AEA Wales Branch Chairman & Electoral Services Manager, Cardiff Council
- Ailsa Irvine, Director of Electoral Administration and Guidance, Electoral Commission



What are the Cabinet Office doing around Route 3 responsible persons?

The identification of Route 3 responsible persons is for the ERO to conduct, and indeed in most cases the ERO will be best placed to identify them. However, if

there are top-down interventions, that can be done, please let us know and we can look into that.

Will software suppliers provide statistical information year on year so that we can build up a picture of many years of what works best?

We are working with the EMS suppliers to create Management Information (MI) for the reformed canvass. These will help you to inform your canvass approach. MI is there not just for the Electoral Commission to monitor your work but to help inform the decisions you make.

Am I correct in my understanding that we won't have to book dates for the national data test and national data matching going forward?

We will have to schedule authorities for the data test. England will go before Scotland and Wales in order to naturally distribute the tests and in accordance with the relevant legislation being made. For the national data tests in the 2020 canvass and beyond, we won't be scheduling dates for authorities. Instead, electoral services teams will need to provide information of when they plan to run their national data match so that we can check that DWP have the capacity to do so.

What will the impact of delaying the publication of the register on the data test?

There will be two main pieces of information for yourselves provided from the data test:

- 1) The match against DWP from the time the snapshot was taken (i.e. summer 2019) that will show which of your properties would go down Route 1 or Route 2.
- 2) The accuracy of your datasets in comparison to your canvass this year.

The first could go ahead regardless of when you publish your register as this is based on your start of canvass snapshot.

That second point can only be created by comparing against a published register. So, if some authorities delay the publication of their register, we will then have to decide how/whether to adjust the data test for those people.

Will there be a national publicity campaign to inform electors of the change?

There won't be a national publicity campaign to inform electors. The changes are a change for us and what we need to do but the overall message of the canvass - that you will receive communication that you need to understand and respond to appropriately (or not respond, as the case may be) - has not changed. In addition, there is no clear call to action at a national level that we could publicise. As such, the Electoral Commission will look to provide resources locally for you to promote what you need to.

How much have you been discussing second homes?

Everything has been discussed in incredible detail. There is no model that is perfect for every situation though.

What support will the devolved administrations provide to the Welsh/Scottish for canvass reform?

Wales - The Welsh Government are working actively to assist with canvass reform, although they are a small team with limited experience as elections only became a devolved power a year ago. Another complication is the unusual legislative

programme at the moment where there are two other Bills are going through the Assembly. We work together well and they are keen to work with us but it will be a tricky road for them to navigate.

Scotland - The Scottish Government also have a small team and three electoral bills to manage at the moment.

If we are unable to implement the reforms in 2020, where does that leave us with IER funding?

Some IER funding is available for next year already, although it is not as much as the current amount. We will need to go to the Treasury to ask for more money so that the same IER funding can continue. We cannot confirm what funding will be made available until we get a funding settlement from Treasury.

If a general election causes delays, will we still do the data test?

We cannot do the data test if the legislative timetable is pushed back and the SI is not made by the end of this year.

If we have an SI but the timings have been affected, we will need to decide whether the data test still goes ahead. It may be that a General Election has such a big impact that the data matching won't be accurate. If we don't have the SI in place, some sort of testing will have to take place, dependent on resources. Whatever happens, the Cabinet Office will have to test the system. When we know the final plan, we will communicate this with you to confirm the exact nature of the data test.

What will the training for canvass reform look like?

We have put together a training package based on the results of the training surveys, which were very positive, that is currently going through out internal approval processes. We are looking at providing EMS training to ensure everyone has adequate training of the processes. There will be a training package from the Cabinet Office. The initial proposal is that it will be conducted through regional branch networks and will seek to facilitate so that you can maximise benefits for canvass reform, as most people understand the process already.

Why do we need Canvass Communication B?

Its intention is to enable you to send a letter that is not a full form with a pre-paid envelope. Part of this is about encouraging people to shift to different channels as including a full form with a pre-paid envelope encourages people to respond via more expensive channels.

When will training take place if/considering that we need to fit in a general election and scheduled elections?

This needs to be finalised. The original intention was for the Canvass Reform team to attend branch meetings in December and February/March next year. If we do have delays this year, we would still hope to deliver workshops in the February/March meetings. The EMS training will most likely occur in May/June 2020.

How are you managing authorities that are merging or going through similar changes?

We will provide the support that is needed for these authorities. Though our checkpoints, for example, we are trying to make sure we contact people to support in challenges. However, we will only be aware of these issues if people tell us that these changes are happening.

Chair's Closing Remarks - Rob Curtis, Chairman, AEA

Question:	Do you think you will be in a position to deliver canvass reform in 2020	
Answers:	Yes 84.7%	No 15.3%

Thank you to all the exhibitors, organisers, Cabinet Office, AEA and EC including all the speakers from the day.

And thank you all for attending.

Close of Event - James Stevens, Conference & Seminar Organiser, AEA

- Thank you all for today, including Rob for chairing the event.
 - The Annual Conference will be held in Blackpool on 2 – 5 February 2020.
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