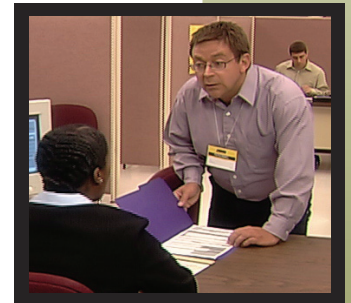
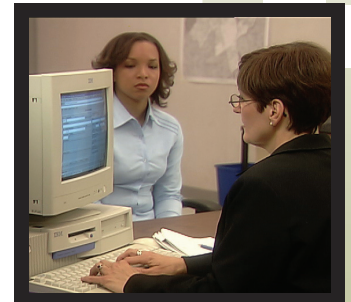


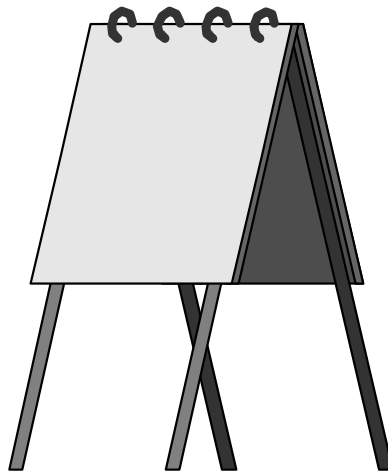
TRAINING MANUAL FOR REVISING AGENTS



LESSON PLANS FOR Revising Agents

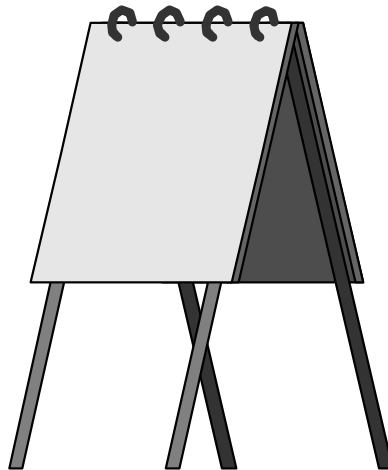
Revising Agent Training Program

Lesson Plans and Overheads



Revision of the Lists of Electors Election

Lesson Plan Module 1: Introduction



July 2009

Introduction to the Revising Agent Training Program

Welcome to the Revising Agent Training Program. This comprehensive document acts as a training officer's guide to leading a classroom training session for revising agents.

There are four modules in the training program:

Module 1: Introduction

Module 2: Revision of the Lists of Electors Using the REVISE System

Module 3: Revision of the Lists Using Forms

Module 4: Targeted Revision

There are three revising agent manuals and one of the three manuals will be used with each lesson plan:

- *A Manual for Revising Agents Using the REVISE System* (EC 40230)
- *A Manual for Revising Agents Using Forms* (EC 40233)
- *A Manual for Revising Agents Doing Targeted Revision* (EC 40232)

Any of the three manuals can be used for Module 1. The corresponding manual must be used for Modules 2, 3 and 4. Each revising agent will participate in Module 1: Introduction. At that point, the revision supervisor, in consultation with the returning officer, will determine the subsequent module(s) to be completed by each revising agent. For example, if targeted revision is a priority, the revision supervisor may arrange for delivery of Modules 1 and 4. It will not be necessary for the revising agent to participate in Modules 2 or 3.

Each module takes approximately one and one-quarter hours to complete and the class size should not exceed 20 participants for Modules 1 and 3. The number of computers available for training will dictate the number of participants for Module 2. There should be one computer for every two participants.

This training is compulsory for all revising agents who work during an electoral event. Some participants have previous experience carrying out revision activities and others will have no experience. The content, activities and support materials in this lesson plan have been designed with inexperienced revising agents in mind. Despite this, changes in the way that revision activities are carried out since the last electoral event will mean that even the most experienced revising agents will benefit from training.

Formal training experience is an asset. However, this lesson plan has been designed to provide a less experienced trainer with the instructions and materials to lead the session. Take time to thoroughly review all of the content, activities and instructions presented in this document. You are encouraged to practise leading this training session a number of times before you present it to a live audience. This will give you the opportunity to become more comfortable presenting the content and activities and to clarify any questions you may have with your returning officer prior to training.

Training revising agents is an important job. The accuracy and integrity of the electoral event depends on the ability of the revising agent to complete the tasks of revision accurately. Thank you for your efforts in making this happen.

Organization of the Training Materials for Module 1: Introduction

Module 1: **Introduction** involves the use of the following:

- This lesson plan
- Transparencies and a flip chart
- A segmented DVD demonstrating a revising agent's duties
- Materials for all training activities
- One of the revising agent manuals:
 - *A Manual for Revising Agents Using the REVISE System* (EC 40230)
 - *A Manual for Revising Agents Using Forms* (EC 40233)
 - *A Manual for Revising Agents Doing Targeted Revision* (EC 40232)
- *A Classroom Workbook for Revising Agents* (EC 40290)

These components have been designed to work together in a very specific way to provide the best possible training experience for the revising agents.

Lesson Plan Design (Module 1)

This lesson plan provides training officers with the information required to conduct this training session, including:







- timing and materials required to deliver each section of this course,
- directions on how to deliver content, i.e. use of flip charts, key points to cover, questions to ask, suggested answers, etc.,
- instructions for conducting training activities, and
- the use of visual aids, i.e. video and transparencies.

You must follow the lesson plan as it is presented to ensure that:

- training is consistent for revising agents across the country, and
- content is covered in its entirety, using the methods designed for this program.

Note: Personalize your delivery by adding your own notes in the white space of the lesson plan.

The following icons will help to guide your actions as you work with the lesson plan.

Icon	Action
	A DVD chapter to show to the class
	Information to be presented using an overhead transparency provided in an appendix to the lesson plan
	Information to be presented from an additional reference source, such as an instruction manual
	Information to be presented or recorded on a flip chart
	A process, activity or sample to demonstrate to the class
	A question or questions to be answered by the class

Training Manual for Revising Agents Design

The revising agent manual is the main source of content for this training program. Each manual is divided into chapters and sections that are referred to by name in this lesson plan. The learning objectives for each part of this training program are provided on the first page of each chapter in the manual.

For evaluation purposes, there is a short multiple-choice quiz at the end of each chapter in the manual. Participants can use these questions to review the information presented in a session and to test their knowledge. The answers for these questions are provided in the Answer Key chapter at the back of the manual.

Video Design

The DVD that accompanies this lesson plan is a key part of this training program. **You must show video's chapters, as prescribed in this lesson plan.**

Visual Aid/Use of Samples and Training Materials

Overhead transparencies and flip chart keywords have been provided to assist in your presentation. Unless already provided, you must reproduce the overheads and prepare your own flip charts, using the suggested keywords, in advance of your training session. The program uses samples of electoral materials as visual aids and exercises in training activities. Please obtain sufficient quantities and demonstrate their proper use whenever possible during your training session.

What You Will Need – List of Supplies

Each participant requires:

- A pen or pencil
- A copy of the appropriate revising agent manual
- A *Classroom Workbook for Revising Agents* (EC 40290)

If the trainee has travelled more than 35 kilometres to attend the training session, a *Kilometre Log* (EC 11700) is also required to register his travel expenses.

To teach Module 1: Introduction, you will need:

- Lesson plan
- Your copy of each revising agent manual:
 1. *A Manual for Revising Agents Using the REVISE System*
 2. *A Manual for Revising Agents Using Forms*
 3. *A Manual for Revising Agents Doing Targeted Revision*
- A copy of *A Classroom Workbook for Revising Agents* (EC 40290)
- A copy of the revising agent training video
- Pre-filled *Appointment and Oath* forms (EC 10130)
- Several flip chart markers, a flip chart and a stand
- Overhead transparencies (reproduced from the overheads in the appendix)
- An overhead projector and screen

- A television set (>21" size screen) with DVD player
- Prepared flip chart:
 - Agenda
- Electoral map

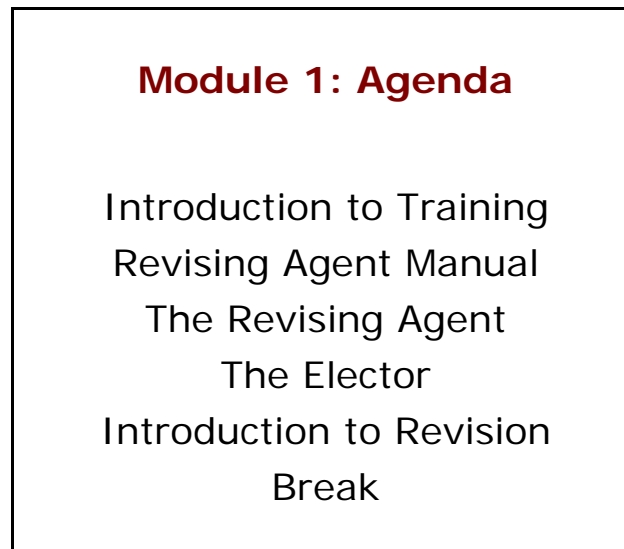
Suggestions for Conducting a Successful Training Event

- Prepare. Ensure that you understand the content and the training techniques used in the program.
- Follow the lesson plan. It has been carefully designed to ensure key content is covered thoroughly with the opportunity to practise what is learned.
- Arrange for a subject matter expert to attend training sessions to help you answer questions and clarify procedures.
- Invite questions at the appropriate time.
- Repeat key information to reinforce learning.
- When individual participants pose questions, ask the group to find the answer using their manuals.
- Answer questions when covering content unless the question will be answered later in the program.
- Show enthusiasm and be positive.
- Provide the group with feedback on their progress.
- Provide clear directions.
- Confirm understanding by asking review questions for each major section of training.
- Use examples that are familiar and relevant.
- Use language that is easy to understand. Avoid using jargon or language that is unfamiliar to participants.
- Use visual aids whenever possible.
- Manage your time carefully. There is a lot of material to cover in a short period of time.
- If there are questions that you can't answer, tell the class that you don't know and that you will find and communicate an answer as soon as possible. List the questions on a flip chart.

Thank you for your effort in conducting this training program. Good luck!

Before the Training Session:

1. Familiarize yourself thoroughly with the course materials.
2. Schedule the facilities and course participants.
3. Organize all supplies and equipment required to conduct this course, using the “*What You Will Need*” list provided for you on page 7.
4. Prepare any flip charts, reproduce any overhead transparencies and fill in any sample forms required for the training session. Each of the flip charts should be written neatly with coloured flip chart markers, using two-inch block letters, and should look like the following sample:




5. Allow adequate time to set up the training room.
6. Select an area in the training facility from which to work. Use a small table or podium to organize your notes and materials.
7. Set up, and practise using the equipment necessary to conduct the course. Ensure that it is all functioning properly.
 - Test the television.
 - Illuminate and focus the overhead projector.
 - Post the electoral map and wall poster.
 - Cue up the video and set the sound level.
 - Position the overhead screen and flip chart.
 - Look at the screen and chart from the back of the room to make sure all participants can see them.
8. Arrange the tables and chairs in the training facility so that they face you. Ensure you have enough chairs for the participants.


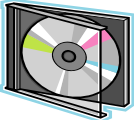
Tip: Make sure you have a spare lamp for the overhead projector and learn how to replace it. They tend to burn out frequently.

As Participants Arrive on Training Day:


1. Welcome the participants to the course.
2. Arrange for someone to register the participants and to distribute:
 - a copy of the appropriate revising agent manual. The manual should be specific to the job the person will complete, and
 - a *Classroom Workbook for Revising Agents* (EC 40290).
3. Give everyone a pen (or pencil).
4. Tell participants when the session will start and direct them to take their seats in the class.

Module 1: Introduction (1 hour 20 min)




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p>(3 min)</p> 	<p>Introduction to Training</p> <ol style="list-style-type: none"> 1. Review the agenda and timing of breaks using flip chart #1. 2. Explain the rationale and objectives for the training program. 	<ul style="list-style-type: none"> • Over the next hour and a quarter you will be introduced to the roles, responsibilities and tasks associated with being a revising agent. • It is important that you know and are able to carry out the tasks associated with revision to ensure the accuracy and integrity of the electoral event. • The training program has been designed so that you learn and practise specific tasks. • There are four modules in the program and you will take two of the four modules: <ol style="list-style-type: none"> 1. Introduction 2. Revision of the Lists of Electors Using the REVISE System 3. Revision of the Lists Using Forms 4. Targeted Revision


Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>3. Review the objectives for the training program overall using the overhead (#1) (Workbook page 1).</p> <p>4. Review the objectives for Module 1 using the overhead (#2) (Workbook page 1).</p>	
	<p>(5 min)</p> 	<p>Video</p> <ol style="list-style-type: none"> 1. Explain that the video provides examples of typical revision transactions and will be shown in chapters during the module. 2. Show the Introduction, Nuts and Bolts and Vignette (chapters 1 and 2). 3. Ask participants their impression of the video chapters. 	<ul style="list-style-type: none"> • The video introduces a variety of revision tasks that revising agents may be asked to perform.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
	(2 min)	<p>Introduction to Revision</p> <p>Note: Descriptions should be brief and provide only enough information so that participants understand revision at a high level. Detailed content follows later in the program.</p> <p>1. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> • Electors can vote if their name is on the list of electors. • When people move or people die, the list isn't accurate. • As a revising agent you make sure the list is accurate and give people the opportunity to register. • Revision takes place during a specific period of time. The calendar dates for this electoral event's revision period are: _____ • The tool to help you update the list of electors is the revising agent manual. • The manual will be used throughout the training program as the main reference source.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
<p data-bbox="138 305 344 440">Important Information About Revision</p> <p data-bbox="138 727 289 792">Table of Contents</p>	<p data-bbox="411 305 520 334">(5 min)</p> 	<p data-bbox="579 305 953 334">Revising Agent Manual</p> <ol data-bbox="579 375 1251 938" style="list-style-type: none"> <li data-bbox="579 375 1251 475">1. Refer to the page: Important Information about Revision (located before the Table of Contents). <li data-bbox="579 516 1115 581">2. Ask participants to complete this page after the training session. <li data-bbox="579 621 1192 686">3. Orient participants to the manual and explain how to locate information. <li data-bbox="579 727 1087 756">4. Refer to the Table of Contents. <li data-bbox="579 797 1241 938">5. Review the content and layout by highlighting the numbering system, section objectives, key points and section checkpoints. 	<p data-bbox="1283 358 1856 456">Revising agents work in pairs so it is important to know how to contact your partner(s).</p> <ul data-bbox="1283 727 1944 954" style="list-style-type: none"> <li data-bbox="1283 727 1944 792">• The key to locating information quickly is to: <ul data-bbox="1331 816 1944 954" style="list-style-type: none"> <li data-bbox="1331 816 1751 846">○ use the table of contents, <li data-bbox="1331 854 1944 954">○ place a note or tab in sections you will refer to often or tasks you find challenging.


Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
<p>REVISE Manual Chapter 9: Appendix, Sections 9.1, 9.2 and 9.3</p> <p>Revision Using Forms Manual Chapter 8: Appendix, Sections 8.1, 8.2 and 8.3</p> <p>Targeted Revision Manual Chapter 8: Appendix, Sections 8.1, 8.2 and 8.3</p>		<p>6. Explain that reference topics are listed in the appendix.</p> <p>7. Ask participants to turn to the appendix and find the following reference topics:</p> <ul style="list-style-type: none"> • Frequently asked questions • Terms you should know • Tools to complete revision 	<p>Answers to most questions revising agents ask are in the manual.</p> <p>The manual is designed to make it easy to navigate and find information.</p>




Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
<p>Chapter 1</p>	<p>(5 min)</p>  	<p>Introduction</p> <ol style="list-style-type: none"> 1. Introduce chapter 1. 2. Ask participants to identify which chapter of the manual they would use to find information about electors (Answer: Chapter 3). 3. Explain that the manual will not be reviewed in its entirety during the training program and that revising agents are expected to read the manual thoroughly before they begin work. 	<ul style="list-style-type: none"> Sections contain information about specific topics or groups of tasks related to revision activities. Samples of forms, flow charts and procedures are provided for reference. Review the manual several times before you begin work as a revising agent.
<p>Chapter 2</p>	<p>(10 min)</p> 	<p>Roles and Responsibilities</p> <ol style="list-style-type: none"> 1. Explain that participants will complete a crossword puzzle to learn about the responsibilities of a revising agent and other important information. 	


Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>2. Ask participants to work with the person next to them and find the answers to the crossword puzzle questions using the manual, chapter 2: Revising Agent Information. (Workbook page 2)</p> <p>3. Allow five minutes to complete the crossword.</p> <p>4. Ask participants to provide answers and to identify where in the manual they found the information.</p> <p>5. Confirm the answers using the answer key.</p> <p>ACROSS</p> <p>1 Revising agents must verify each other's work.</p> <p>4 Revising agents are required to work in pairs.</p> <p>6 The position supports the technology used in the office of the returning officer. Automation coordinator</p> <p>10 One of the ways revision forms can be processed. Manually</p> <p>13 You are required to wear for identification. Badge</p> <p>14 First day of revision is usually thirty-three days prior to polling day.</p>	<p>The objective is to have participants become familiar with how the manual looks and reads when trying to find information.</p>


Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>DOWN</p> <p>2 When revising agents work. Revision period</p> <p>3 Form required to be carried with you at all times. Appointment and Oath</p> <p>5 One of the ways an elector may contact revising agents. Mail</p> <p>7 A key activity for revising agents that involves going places. Targeted revision</p> <p>8 Keep a customer service mindset.</p> <p>9 The total number of days revision activities take place. Twenty-eight</p> <p>11 What the <i>Appointment and Oath</i> gives you. Authority</p> <p>12 Some revising agents will work here during what is described in 7 down. Residences</p>	

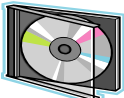

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>6. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> • Make sure you are accurate and efficient when you are entering information. • Carry your <i>Appointment and Oath</i> with you when you work. • Know revision dates so you can advise electors of deadlines. • Maintain a customer service mindset when serving electors or other members of the electoral event team. • Receiving requests from electors is one of your key responsibilities.
	(10 min)	<p>Video</p> <p>1. Explain that: Training will cover the specific procedures associated with different types of revision tasks. The video shows examples of what electors request and the solutions that meet their needs.</p> <p>2. Show chapters (#3, #4, #5, #6 #7 and #8).</p> <p>3. Debrief asking participants, “How were the electors treated by the revising agents?” (Answer – Respectfully, politely, courteously)</p>	<p>Electors who are treated with a customer service mindset leave satisfied and assured.</p>

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>4. Explain that when revising agents come in contact with an elector they have a responsibility to provide a positive electoral experience.</p>	
<p>Chapter 3</p>	<p>(10 min)</p> 	<p>Elector Qualifications/Defining “Ordinarily Resident”</p> <ol style="list-style-type: none"> 1. Refer participants to the chapter 3 2. Review elector qualifications using the manual and the overhead (#3). 3. Form groups of 3–5 participants. 4. Ask each group to read the section of the manual, section 3.2, <i>Place of Residence</i>. 5. Refer to the three electors described in the workbook. (Workbook page 3) 6. Ask participants to: <ul style="list-style-type: none"> • review the information for each elector, • determine whether or not the elector is qualified to vote and why, • record the answers in their workbook. 	<ul style="list-style-type: none"> • A person is ordinarily resident at the place he calls home. • An elector may be ordinarily resident in one place at a time. • If in doubt, check with the revision supervisor.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>7. Allow three minutes to complete the activity.</p> <p>8. Ask for volunteers to answer and to explain the answer. (Answers: Elector A – Yes, Elector B – Yes, Elector C – No)</p> <p>9. Clarify if necessary to ensure understanding.</p>	<ul style="list-style-type: none"> • Elector A – Yes – A student’s residence can be considered a place of ordinary residence if the student does not intend to return to his previous home. • Elector B – Yes – The elector is a Canadian citizen and wants to vote in the electoral district of his ordinary residence. • Elector C – No – The elector’s cottage is his secondary residence. Since the elector’s ordinary residence is in another electoral district, he will need to vote in that district.
<p>Chapter 3</p>	<p>(10 min)</p> <div style="text-align: center;">   </div>	<p>Identification and Proof of Residency</p> <ol style="list-style-type: none"> 1. Review the requirements for proof of residency using the manual section 3.3. 2. Form pairs. 3. Refer to the three sets of sample identification documents provided in the workbook. (Workbook pages 4, 5 & 6) 	

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>4. Ask each pair to:</p> <ul style="list-style-type: none"> • look at the identification for each elector, • determine whether or not it would be considered satisfactory using the criteria in the manual, • record their responses in the workbook. <p>5. Allow five minutes to complete the task.</p> <p>6. Debrief asking for correct answers for each elector and ensure that the correct explanation is provided. (Answer: Elector #1: No: no name and signature document Elector #2: No: no name and signature document Elector #3: Yes: name and signature (name and address documents provided))</p>	

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
Chapter 4	(5 min) 	<p>Overview of Revision</p> <p><i>Types of Revision</i></p> <ol style="list-style-type: none"> 1. Ask participants, “What is revision?” Confirm the answer using the manual and overhead (#4) (Answer: Section 4.1) 2. Ask participants, “What is targeted revision?” Confirm the answer using the manual and overhead (#5). (Answer: Section 4.2) 3. Explain the difference between revision and targeted revision. 	<ul style="list-style-type: none"> • Changes made to the <i>Preliminary List of Electors</i> (PLE) prior to polling day mean fewer problems and registrations on election day. • When an elector is visited at his place of residence by revising agents, he may provide information about the identity and residence of all electors at that residence, including himself, take an oath attesting to the accuracy of that information and sign the prescribed form. No other proof of identity or residence is required.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
	(5 min) 	<p>Video</p> <ol style="list-style-type: none"> Show video chapters #9 and #11. (Do not show chapter 10: <i>Targeted Revision 1</i>.) Highlight the: <ul style="list-style-type: none"> customer service aspect of targeted revision, relationship between returned voter information cards and targeted revision. Explain that revision activities take place within a specific period of time. 	<p>Chapter 10: <i>Targeted Revision 1</i> is no longer current regarding identification required at the door, as mentioned above.</p>
<p>Chapter 4 Section 4.6 Targeted Revision Manual: Section 4.4</p>	(5 min) 	<p><i>Revision Calendar</i></p> <ol style="list-style-type: none"> Ask participants to find the revision calendar in the manual. Review the revision calendar. 	<ul style="list-style-type: none"> Revising activities end on Day 6 of the electoral calendar.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
	(5 min)	<p>Module #1: Summary</p> <ol style="list-style-type: none"> 1. Show chapter #12 (Conclusion) and congratulate participants on making the decision to be a part of the electoral process. 2. Form pairs. 3. Ask each pair to complete the review questions in the workbook and check their responses using the answer key at the end of the workbook. (Workbook page 7) 4. Ask for questions about the content covered in Module 1. 5. Answer questions from participants. 6. Inform participants that a new section titled Reference Material which includes; a summary of the decision taken by the Canadian Human Rights Tribunal in the case of Reverend Hughes, a corresponding case study, and pertinent sections of the Canadian Charter of Rights and Freedoms and the Canadian Human Rights Act has been added at the end of your procedure manual. This material is mandatory reading. 	<ul style="list-style-type: none"> • Remind participants that Module 2 covers revision using REVISE. Module 3 covers revision using paper forms. Module 4 covers targeted revision. • Revision can take place in person, over the phone or by mail.

Manual Reference	Time/ Action	What to Do	Key Points to Emphasize
		<p>7. Distribute pre-filled <i>Appointment and Oath</i> forms (EC 10130).</p> <p>8. Tell participants when and where Modules 2, 3 and 4 will take place.</p> <p>9. Break for 10 minutes and prepare to deliver the next module.</p> <p>Note:</p> <ul style="list-style-type: none"> • Participants will complete Modules 2, 3 or 4 depending on the type of revision they will carry out. • It is possible that some revising agents will complete both Module 2 and Module 3. 	

Revising Agent Training Program: Module 1

Module 1: Agenda

Introduction to Training

Revising Agent Manual

The Revising Agent

The Elector

Introduction to Revision

BREAK

Total Training Time – 1 hour 15 minutes

Program Objectives

By the end of the Revising Agent Training Program, you will be able to:

- **complete revision tasks,**
- **follow procedures to revise or register an elector,**
- **operate as an effective member of the revision team,**
- **resolve problems with electors,**
- **provide a positive experience for the elector.**

Module 1: Objectives

By the end of this module, you will be able to:

- **list the rights of the elector,**
- **list the eligibility requirements,**
- **use the revising agent manual.**

Elector Qualifications

- at least 18 years old on polling day,
- Canadian citizen, and
- Ordinarily resident in the ED in which they wish to vote.

Revision is...

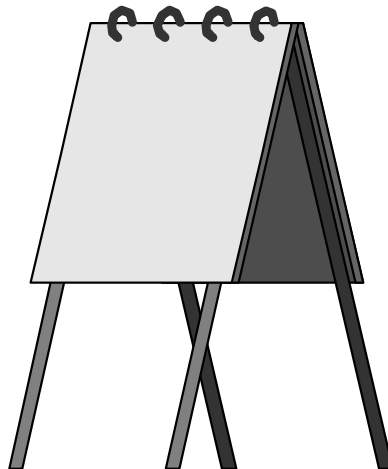
- a period of four weeks prior to an electoral event, and
- when revising agents respond to elector requests to have their names:
 - added to,
 - corrected on, or
 - deleted from the PLE.

Targeted Revision is...

- Targeted revision is an outreach initiative aimed at extending service to sectors of the electorate who are at risk of not being on the *Preliminary List of Electors*, by offering them a variety of methods for registration.
 - the opportunity to register;
 - the opportunity to vote

Revision of the Lists of Electors Election

Lesson Plan Module 2: Revision of the Lists of Electors Using the REVISE System



July 2009

Introduction to the Revising Agent Training Program

Welcome to the Revising Agent Training Program. This comprehensive document acts as a training officer's guide to leading a classroom training session for revising agents.

There are four modules in the training program:

Module 1: Introduction

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Module 3: Revision of the Lists Using Forms

Module 4: Targeted Revision

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This training is compulsory for all revising agents who work during an electoral event. Some participants have previous experience carrying out revision activities and others will have no experience. The content, activities and support materials in this lesson plan have been designed with inexperienced revising agents in mind. Despite this, changes in the way that revision activities are carried out since the last electoral event will mean that even the most experienced revising agents will benefit from training.

Formal training experience is an asset. However, this lesson plan has been designed to provide a less experienced trainer with the instructions and materials to lead the session. Take time to thoroughly review all of the content, activities and instructions presented in this document. You are encouraged to practise leading this training session a number of times before you present it to a live audience. This will give you the opportunity to become more comfortable presenting the content and activities and to clarify any questions you may have with your returning officer prior to training.

Training revising agents is an important job. The accuracy and integrity of the electoral event depends on the ability of the revising agent to complete the tasks of revision accurately. Thank you for your efforts in making this happen.

Organization of the Training Materials

Module 2: *Revision of the Lists of Electors Using the REVISE System* involves the use of the following:

- this lesson plan;
- transparencies and flip chart;
- materials for all training activities;
- *A Manual for Revising Agents Using the REVISE System* (EC 40232);
- *A Classroom Workbook for Revising Agents* (EC 40290).

These components have been designed to work together in a very specific way to provide the best possible training experience for the revising agents.

Lesson Plan Design (Module 2)

This lesson plan provides training officers with the information required to conduct this training session, including:






- time and materials required to deliver each section of this course;
- directions on how to deliver content, i.e. use of flip chart, key points to cover, questions to ask, suggested answers, etc.;
- instructions for conducting training activities; and
- the use of visual aids i.e. transparencies.

You must follow the lesson plan as it is presented to ensure that:

- training is consistent for revising agents across the country, and
- content is covered in its entirety, using the methods designed for this program.

Note: Personalize your delivery by adding your own notes in the white space of the lesson plan.

The following icons will help to guide your actions as you work with the lesson plan.

Icon	Action
	Information to be presented using an overhead transparency provided in an appendix to the lesson plan.
	Information to be presented from an additional reference source, such as an instruction manual.
	Information to be presented or recorded on a flip chart.
	A process, activity or sample to demonstrate to the class.
	A question or questions to be answered by the class.

Training Manual for Revising Agents Design

The revising agent manual is the main source of content for this training program. Each manual is divided into chapters and sections that are referred to by name in this lesson plan. The learning objectives for each part of this training program are provided on the first page of each chapter in the manual.

For evaluation purposes, there is a short multiple-choice quiz at the end of each chapter in the manual. Participants can use these questions to review the information presented in a session and to test their knowledge. The answers for these questions are provided in the Answer Key chapter at the back of the manual.

Visual Aid/Use of Samples and Training Materials

Overhead transparencies and flip chart keywords have been provided to assist in your presentation. Unless already provided, you must reproduce the overheads and prepare your own flip charts, using the suggested keywords, in advance of your training session. The program uses samples of electoral materials as visual aids and exercises in training activities. Please obtain sufficient quantities and demonstrate their proper use whenever possible during your training session.

What You Will Need – List of Supplies

Each participant requires:

- A pen or pencil
- A copy of *A Manual for Revising Agents Using the REVISE System* (EC 40232)
- A *Classroom Workbook for Revising Agents* (EC 40290)

If the trainee has travelled more than 35 kilometres to attend the training session, a *Kilometre Log* (EC 11700) is also required to register his travel expenses.

To teach Module 2: Revision of the Lists of Electors Using the REVISE System, you will need:

- Lesson plan
- Your copy of *A Manual for Revising Agents Using the REVISE System* (EC 40232)
- A copy of *A Classroom Workbook for Revising Agents* (EC 40290)
- Pre-filled *Appointment and Oath forms* (EC 10130)
- Several flip chart markers, a flip chart and a stand
- Overhead transparencies (reproduced from the overheads in the appendix)
- An overhead projector and screen
- Prepared flip chart:
 - o Agenda
- Guide for REVISE Users* (EC 40238)

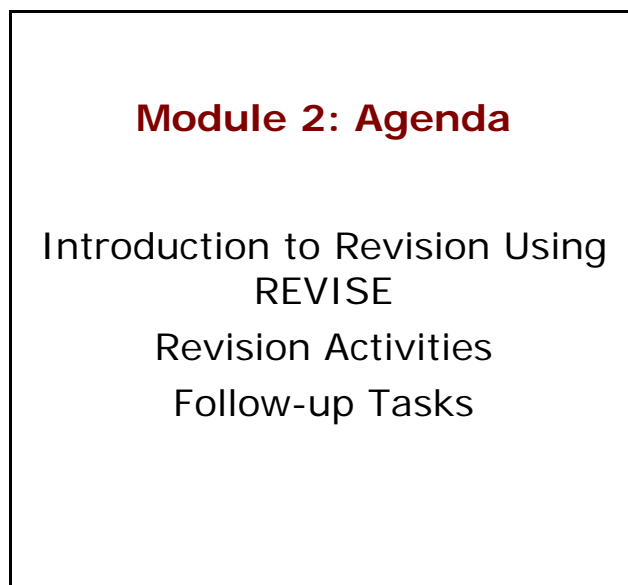
Suggestions for Conducting a Successful Training Event

- Prepare. Ensure that you understand the content and the training techniques used in the program.
- Follow the lesson plan. It has been carefully designed to ensure key content is covered thoroughly with the opportunity to practise what is learned.
- Arrange for a subject matter expert to attend training sessions to help you answer questions and clarify procedures.
- Invite questions at the appropriate time.
- Repeat key information to reinforce learning.
- When individual participants pose questions, ask the group to find the answer using their manuals.
- Answer questions when covering content unless the question will be answered later in the program.
- Show enthusiasm and be positive.
- Provide the group with feedback on their progress.
- Provide clear directions.
- Confirm understanding by asking review questions for each major section of training.
- Use examples that are familiar and relevant.
- Use language that is easy to understand. Avoid using jargon or language that is unfamiliar to participants.
- Use visual aids whenever possible.
- Manage your time carefully. There is a lot of material to cover in a short period of time.
- If there are questions that you can't answer, tell the class that you don't know and that you will find and communicate an answer as soon as possible. List the questions on a flip chart.

Thank you for your effort in conducting this training program. Good luck!

Before the Training Session:

1. Familiarize yourself thoroughly with the course materials.
2. Schedule the facilities and course participants.
3. Organize all supplies and equipment required to conduct this course, using the “*What You Will Need*” list provided for you on page 7.
4. Prepare any flip charts, reproduce any overhead transparencies required for the training session. Each of the flip charts should be written neatly with coloured flip chart markers, using two-inch block letters, and should look like the following sample:



5. Allow adequate time to set up the training room.
6. Select an area in the training facility from which to work. Use a small table or podium to organize your notes and materials.

7. Set up, and practise using, the equipment necessary to conduct the course. Ensure that it is all functioning properly.
 - Illuminate and focus the overhead projector.
 - Post the electoral map.
 - Position the overhead screen and flip chart.
 - Look at the screen and chart from the back of the room to make sure all participants can see them.
8. Set your table and material so that participants at the computers can see you. Ensure you have enough chairs for the participants.

Tip: Make sure you have a spare lamp for the overhead projector and learn how to replace it. They tend to burn out frequently.


9. Confirm that participants are already familiar with REVISE and the training database. This module will not include training on REVISE functionalities.
10. Confirm that participants have their *Manual for Revising Agents Using the REVISE System* (EC 40230) and the participant workbook to refer to during training.
11. Ensure that the automation coordinator is available to handle technical problems that may arise.
12. Make sure that the training database is working on all the computers that will be used for training and that participants log on prior to beginning Module 2.
13. During the program, ensure that each participant is assigned a different elector from the list of electors provided in the workbook for the activities in this module. Participants will then avoid accessing the same record. An elector record can be updated by only one user at a time in REVISE.
14. **Ensure that the training database is refreshed after each session by the automation coordinator.**





Note: Data used in the module are compatible with the REVISE training database.


As Participants Arrive on Training Day:


1. Welcome the participants to the course.
2. Give everyone a pen (or pencil).
3. Tell participants when the session will start and direct them to take their seats in the class.
4. Confirm that participants have their *Manual for Revising Agents Using the REVISE System* (EC 40230) and a *Classroom Workbook for Revising Agents* (EC 40290) to refer to during training.


Module 2: Revision of the Lists of Electors Using the REVISE System (1 hour 40 min)





Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p>(3 min)</p> 	<p>Introduction to Module 2</p> <ol style="list-style-type: none"> 1. Form pairs with one pair working at each computer. 2. Welcome participants to Module 2. 3. Review the agenda using flip chart. 4. Review the objectives for Module 2 using the overhead (#1) (Workbook page 8). 5. Explain that the computers and revising agent manuals will be used to complete activities during training. 6. Review content in Key Points to Emphasize. 	<ul style="list-style-type: none"> • Procedures to complete revision tasks in this module use the REVISE software on a computer. • Resolving electors' problems using REVISE is similar to resolving electors' problems using paper-based forms. • Always apply a customer service mindset when serving the elector.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5, <i>Completing Revision Using REVISE</i></p>	<p>(2 min)</p> 	<p>Introduction to Revision Using REVISE</p> <ol style="list-style-type: none"> 1. Explain that revision using REVISE will take place only at the office of the returning officer. 2. Display the overhead (#2). 3. Explain to participants the three steps to revision. 4. Explain that each step will be reviewed using REVISE and the revising agent manual. 	<p>The three steps must be completed regardless of whether the elector applies in person, over the phone, or has completed a form and mailed it to the office of the returning officer.</p>
<p>Chapter 5</p>	<p>(5 min)</p>   	<p>Introduction to Step 1: Conduct the Search</p> <ol style="list-style-type: none"> 1. Ask “For every elector request, what is always the first step?” (Answer: Conduct a search.) 2. Refer participants to the manual, chapter 5. 3. Display the overhead (#3). 	<ul style="list-style-type: none"> The first step always involves conducting a search to establish the elector’s status on the preliminary list of electors.



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>4. Ask participants for the difference between a national and local search. (Answer: Local searches the electoral district; National searches every electoral district in the country.)</p> <p>5. Review the Search section of the flow chart in section 5.3 of the manual.</p> <p>6. Explain that the results of Step 1: Conduct the search, determine the elector’s status on the preliminary list of electors, and answer the question, “Am I on the list?”</p> <p>7. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> • Searches always begin with a local search, and then move to a national search if the elector is not found. • The results of a search always drive the type of transaction that will be completed by REVISE. • A local search means that you will enter the name of the elector in an attempt to find him at his current or previous address within the electoral district.


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p>	<p>(5 min)</p>  <p>?</p> <p>?</p> <p>?</p> <p>?</p>	<p>Revision Task #1</p> <p>Step 1: Conduct the search</p> <ol style="list-style-type: none"> 1. Refer participants to the If/Then table in section 5.3, <i>Step 1: Conduct the Search</i> for local searches and review the table. 2. Ask participants to start the scenario: keep a customer service mindset, greet the elector and conduct a search for their assigned elector using REVISE. 3. Ask for the result of their local search. (Answer: Elector not found.) 4. Ask for the result of their national search. (Answer: Elector not found.) 5. Ask participants what the table tells them to do when they don't find a match after conducting a national search. (Answer: Register the elector.) 	<ul style="list-style-type: none"> • Register an elector only after you have completed both a local and a national search and not found the elector. • Remind participants to only use the elector's first and last name to conduct the search. They can use the address and date of birth to help them select the appropriate record. • All electors registering must meet the qualification criteria: they have to be at least 18 years old on polling day, a Canadian citizen and ordinarily resident of the district (see revising agent manual, chapter 3, section 3.2). • All electors must establish their identity. Because you were unable to establish his identity using the list, the elector must show acceptable identification (see revising agent manual, chapter 3, section 3.3).

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>6. Ask participants to determine if the elector meets the qualifications and is able to establish his ID.</p>	
<p>Chapter 5</p>	<p>(10 min)</p> 	<p>Step 2: Complete the transaction</p> <p>Introduction to Step 2: Complete the transaction</p> <ol style="list-style-type: none"> 1. Refer to the manual in chapter 3, section 5.3. 2. Display the overhead (#5). 3. Explain that, depending on the results from Step 1, the revising agent will proceed to Step 2: Complete the transaction. This will involve completing one of three tasks: <ul style="list-style-type: none"> • Updating the elector record • Removing the elector record • Creating an elector record 	<ul style="list-style-type: none"> • You may also confirm with the elector that they are correctly registered on the preliminary list of electors.


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	   	<p>4. Review the If/Then tables in the manual for the three tasks (section 5.3: <i>Step 2: Complete the transaction</i>).</p> <p>5. Display the overhead (#6). Ask questions to confirm understanding. Ask participants where in the manual they found the answer.</p> <p>“What do you do when...”</p> <ul style="list-style-type: none"> An elector asks to be removed from the preliminary list of electors? (Answer: Remove the record and remind the elector that he will need to apply to Elections Canada in writing if he wishes to be permanently deleted from the NRoE.) You are updating a record and find that there are other electors living at the same address as the elector? (Answer: Ask the elector to provide the names of any other qualified electors living at the same address and then remove electors that are not living at the applicant’s address.) 	




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>6. Review the flowchart in section 5.3.</p>	
	<p>(3 min)</p> <p>?</p>	<p>Revision Task #2</p> <p>Step 2: Complete the transaction</p> <ol style="list-style-type: none"> 1. Ask participants to return to their roles of elector and revising agent and proceed with the transaction using REVISE and then save the transaction. 2. Ask participants what appears when the record is saved. (Answer: Validation questions appear.) 	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(2 min) 	Introduction to Step 3: Validate the transaction 1. Refer to the manual in chapter 5, section 5.3. 2. Explain that the last step involves validating the transaction. 3. Display the overhead (#7). 4. Review the questions.	<ul style="list-style-type: none"> Validating the transaction ensures quality control by answering questions asked by REVISE based on the transaction that has been completed. The type of transaction the revising agent has completed determines validation questions that appear on the screen.
Chapter 5	(10 min) 	Answering Validation Questions 1. Refer to the activity questions in the workbook and the If/Then tables for each validation question in the manual in section 5.3: <i>Step 3: Validate the transaction (Workbook page 11)</i> . 2. Ask the group to find the answer to each question and write the section of the manual where they found the answer in the workbook. 3. Allow five minutes to complete the activity.	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>4. Ask for an answer to each question and the manual reference.</p> <p>Answers</p> <ol style="list-style-type: none"> 1. Answer No to the question; print and arrange for the form to be signed by the elector; complete the transaction log; <i>Step 3: Validate the transaction, Will the elector sign the form?</i> 2. Answer No to the question; contact the elector; <i>Step 3: Validate the transaction, Did the elector provide ID?</i> 3. Answer Yes to the question; print a voter information sheet for the elector; <i>Step 3: Validate the transaction, Did the elector require a Voter Information Sheet?</i> 4. Answer Yes; <i>Step 3: Validate the transaction, Does the elector wish to receive a Voter Information Card?</i> 	<ul style="list-style-type: none"> • The tables in the manual are useful for understanding the results of the validation process.




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p> <p>Section 5.3</p>	<p>(3 min)</p>	<p>Revision Task #3</p> <p>Step 3: Validate the transaction</p> <ol style="list-style-type: none"> 1. Ask participants to return to their roles of elector and revising agent and answer the validation questions. 2. Ask participants to complete the transaction (obtain signature and ID if necessary). 3. Congratulate participants for successfully registering an elector. 4. Summarize by reviewing the three steps participants completed in task #1. 	<p>The elector will need to sign the form in certain cases such as a registration. Always make sure that the applicant reads the form before signing the declaration.</p>


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p> <p>Section 5.3</p>	<p>(10 min)</p> 	<p>Revision Task #4:</p> <ol style="list-style-type: none"> 1. Ask participants to switch roles with their partner to complete revision task #4. 2. Refer participants to the list of electors in the workbook (Workbook page 9) and assign an elector from the list that was not registered in the previous activity. Do not indicate to participants the type of transaction they will complete. 3. Display the overhead (#8) and review the scenario. 4. Repeat the activity for task #4 reminding participants to complete all three steps (Workbook page 12). <p>Note: The assigned elector will not be found following a local or national search and participants will register the elector.</p> <ol style="list-style-type: none"> 5. Congratulate participants for registering another elector. 	


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(5 min)   	<p>Revising Elector Information Using REVISE</p> <p>Removing an elector record</p> <ol style="list-style-type: none"> Review the reasons that an elector record may be removed using the manual, in chapter 5, section 5.3. Explain that procedures for removing a deceased elector from the list are different depending on where the applicant lives. Ask participants where in the manual they would find information about deceased electors. (Answer: Section 5.3.). Ask participants what happens when the applicant lives at the same address as the deceased and when the applicant does not live at the same address. (Answer: A death certificate is required when an applicant does not live at the same address as the deceased and the applicant must provide his own proof of identification.) 	<ul style="list-style-type: none"> A death certificate is not required if the applicant requesting the removal of the record lives at the same address as the deceased.

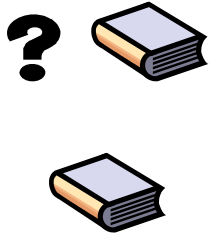

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p>	<p>(5 min)</p>  	<p>Revision Task #5</p> <ol style="list-style-type: none"> 1. Refer participants to the list of electors in the workbook (Workbook page 13). 2. Assign a different elector from the list to each participant and ask them to decide who will be the applicant and who will be the revising agent. 3. Display the overhead (#9) and review the scenario (Workbook page 13). 4. Review the steps involved in removing an elector in section 5.3 of the manual. 5. Ask participants to take turns and role-play the scenario. <p>Note: Remind participants to follow the three steps of revision as they remove the elector.</p> <ol style="list-style-type: none"> 6. Explain that, once the record has been removed, the <i>Application for Revision</i> form will print and the revising agent completes section 7. 	<ul style="list-style-type: none"> • Section 7 requires that the applicant provide identification. • The form must be signed by the applicant. Make sure that he reviews the form before signing the declaration.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(5 min)  	<p>Revision Task #6</p> <ol style="list-style-type: none"> 1. Ask partners to once again switch places at the computer. 2. Assign a different elector from the list (Workbook page 14) to each pair. Do not indicate to participants the type of transaction they will complete. <p>Note: Participants must be assigned a name from the correct list to allow them to successfully complete a transfer.</p> <ol style="list-style-type: none"> 3. Ask each pair to decide who will be the elector and who will be the revising agent. 4. Display the overhead (#10) and explain the scenario (Workbook page 14). 5. Ask participants to proceed with the activity and keep a customer service mindset. <p>Note: The assigned elector will be found following a national search and the record will require updating (transfer from another electoral district).</p>	<ul style="list-style-type: none"> • When participants save the data, the “No Longer at Address” dialogue box will appear with electors who are registered at this address. • When the elector is present, the revising agent should confirm with the elector that there are no other qualified electors living at the same address before removing electors.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	(2 min) 	Follow-up Activities 1. Explain that there are tasks that revising agents must complete after they have finished a session on REVISE (Workbook page 15). 2. Display the overhead (#11) and review the task list.	
Chapter 5	(5 min)  	Checking the <i>Journal Report</i> and Using the <i>Journal Report Control Log</i> 1. Explain that the <i>Journal Report</i> summarizes all the records that a revising agent has updated or created in REVISE. 2. Explain that, once the revising agent has finished a session entering data in REVISE, the <i>Journal Report</i> is printed. 3. Review the <i>Journal Report</i> and <i>Journal Report Control Log</i> procedures and samples in section 5.5 of the manual. 4. Review common errors to look for using the overhead (#12). 5. Review content in Key Points to Emphasize.	<ul style="list-style-type: none"> • REVISE generates <i>Journal Reports</i>. • The log tracks <i>Journal Reports</i> printed from REVISE and allows the revision supervisor to manage the revising agent's work. • <i>Journal Reports</i> must be generated each time a revising agent ends a session on the computer.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
			<ul style="list-style-type: none"> • The signature of the revising agent on the <i>Journal Report</i> lets the revision supervisor know the report has been checked. • The <i>Journal Report</i> must be: <ul style="list-style-type: none"> ➤ signed, ➤ reviewed by your partner for errors. • Errors found must be corrected. • A new <i>Journal Report</i> must be printed after corrections are made.
<p>Chapter 5</p> <p>Section 5.5</p>	<p>(10 min)</p>  <p>?</p>	<p>Activity: Checking <i>Journal Reports</i> for Errors</p> <ol style="list-style-type: none"> 1. Refer to the two-page <i>Journal Report</i> sample in the workbook (Workbook pages 16 and 17). 2. Ask participants to identify the errors or omissions on the <i>Journal Report</i>. <ul style="list-style-type: none"> • Missing: <ul style="list-style-type: none"> ➤ Postal codes (many records) ➤ Date of birth (many records) ➤ Gender (Angelica Han) ➤ Apartment # (Robert Lemay and Alexandra Gomey) 	

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<ul style="list-style-type: none"> • Typing errors (“Jennnifer Lemay”) • Unusual for so many electors to be opting out of NRoE; follow up with the revising agent immediately. • Incomplete mailing address (Martin Joseph Dorrel: P.O. Box number is missing). • Civic and mailing addresses should be checked (Pauline and Etienne Munson: both electors live at the same address; one has a mailing address and the other doesn’t). <p>3. Ask participants: “What do you do with the <i>Journal Report</i> and the attached forms after they have been verified by you and your partner?” (Answer: Place them in the Ready to be checked basket for the revision supervisor.)</p>	
Chapter 6	(4 min)	<p>Completing the <i>Transaction Log</i> (EC 40091)</p> <p>1. Explain that the <i>Transaction Log</i> (EC 40091) is a form that is completed when some type of (follow-up) is required on the part of the revising agent for a specific transaction with an elector.</p>	<ul style="list-style-type: none"> • The <i>Transaction Log</i> is a quality control measure that ensures that every opportunity is provided to the elector to register or revise information. • Make sure entries are detailed enough that another revising agent would be able to follow up with the elector.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<ol style="list-style-type: none"> 2. Ask participants to find the section in the manual that tells them how to complete the <i>Transaction Log</i>. (Answer: Chapter 6, section 6.2) 3. Review the procedure to complete the <i>Transaction Log</i> (EC 40091) using the sample in the workbook and the manual (Workbook page 18). 	
Chapter 5	(5 min) 	<p>Module #2: Summary</p> <ol style="list-style-type: none"> 1. Refer participants to the flow chart in section 5.1 of the manual. 2. Review the steps for revision using REVISE using the flow chart. 3. Ask participants to complete the review questions in the workbook (Workbook page 19). 4. Ask participants if they have any questions about the content covered in Module 2. 5. Answer questions from participants. 	

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>6. Instruct participants to:</p> <ul style="list-style-type: none"> • log off REVISE, • take their manuals when they leave. <p>7. Thank participants for attending.</p> <p>8. Ensure the training database is refreshed for the next training session.</p>	

Revising Agent Training Program: Module 2

Module 2: Agenda

Introduction to Revision Using REVISE

Revision Activities

Follow-Up Tasks

Total Training Time – 1 hour 40 minutes

Module 2: Objectives

By the end of this module, you will be able to:

- follow the procedures to update or create an elector record using REVISE,
- check a *Journal Report* for errors,
- complete the *Transaction Log*.

The Three Steps of Revision

- Conduct the search.
- Complete the transaction.
- Validate the transaction.

Step 1: Conduct the Search

- Conduct a local search
- If elector not found, conduct a national search.
- Determine the elector's status on the PLE and answer the question, "Am I on the list?"

Revision Task #1

Scenario:

- The elector you have been assigned has not received a voter information card (VIC).

Step 2: Complete the Transaction

1. Update the elector record.
2. Remove the elector record.
3. Create the elector record.

Completing the Transaction

What do you do when:

- an elector asks to be removed from the PLE?
- updating a record and you find other electors living at the same address?
- the elector is deceased and the applicant does not live at the same address?
- creating a record and the applicant is not the elector?
- creating a record and a message indicates a similar record was found?

Step 3: Validate the Transaction

- Will the elector sign the form in your presence?
- Did the elector show ID?
- Print a voter information sheet immediately?
- Mail a VIC to the elector?
- Does the elector wish to be excluded from the NRoE?
- Was proof of death presented?

Revision Task #4

Scenario:

- The elector you have been assigned wants to register.

Revision Task #5

Scenario:

An applicant has come to the office with a voter information card for a deceased family member.

- The deceased elector is the person whose name you were assigned.
- The applicant does not live at the same address as the deceased.
- The applicant has a death certificate.

Revision Task #6

Scenario:

- **The elector whose name you were assigned has moved from another province (Quebec) and wants to make sure he is registered to vote in the upcoming election.**

Follow-up Activities

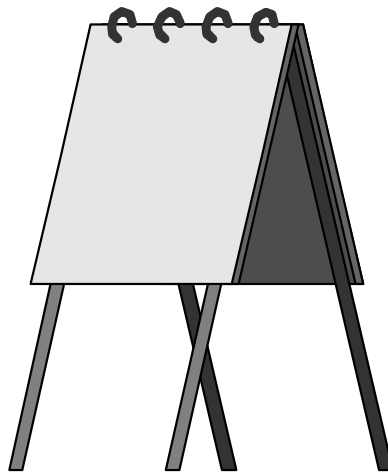
- Print, check and correct the *Journal Report*.
- Complete the *Journal Report Control Log*.
- Give the *Journal Report* to your partner for verification.
- Check your partner's *Journal Report*.
- Complete the *Transaction Log* (EC 40091) if required.
- Mail paperwork.
- Check with the revision supervisor for additional follow-up tasks.

Common Errors to Look for in *Journal Reports*

- **Missing or incomplete:**
 - **Postal codes**
 - **Date of birth**
 - **Gender**
 - **Address**
- **Dates entered incorrectly**
- **Spelling errors**
- **Several electors in a row listed as opting out of the NRoE**

Revision of the Lists of Electors Election

Lesson Plan Module 3: Revision of the Lists Using Forms



July 2009

Introduction to the Revising Agent Training Program

Welcome to the Revising Agent Training Program. This comprehensive document acts as a training officer's guide to leading a classroom training session for revising agents.

There are four modules in the training program:

Module 1: Introduction

Module 2: Revision of the Lists of Electors Using the REVISE System

Module 3: Revision of the Lists Using Forms

Module 4: Targeted Revision

There are three revising agent manuals and one of the three manuals will be used with each lesson plan:

- *A Manual for Revising Agents Using the REVISE System* (EC 40230)
- *A Manual for Revising Agents Using Forms* (EC 40233)
- *A Manual for Revising Agents Doing Targeted Revision* (EC 40232)

Any of the three manuals can be used for Module 1. The corresponding manual must be used for Modules 2, 3 and 4. Each revising agent will participate in Module 1: Introduction. At that point, the revision supervisor, in consultation with the returning officer, will determine the subsequent module(s) to be completed by each revising agent. For example, if targeted revision is a priority, the revision supervisor may arrange for delivery of Modules 1 and 4. It will not be necessary for the revising agent to participate in Modules 2 or 3.

Each module takes approximately one and one-quarter hours to complete and the class size should not exceed 20 participants for Modules 1 and 3. The number of computers available for training will dictate the number of participants for Module 2. There should be one computer for every two participants.

This training is compulsory for all revising agents who work during an electoral event. Some participants have previous experience carrying out revision activities and others will have no experience. The content, activities and support materials in this lesson plan have been designed with inexperienced revising agents in mind. Despite this, changes in the way that revision activities are carried out since the last electoral event will mean that even the most experienced revising agents will benefit from training.

Formal training experience is an asset. However, this lesson plan has been designed to provide a less experienced trainer with the instructions and materials to lead the session. Take time to thoroughly review all of the content, activities and instructions presented in this document. You are encouraged to practise leading this training session a number of times before you present it to a live audience. This will give you the opportunity to become more comfortable presenting the content and activities and to clarify any questions you may have with your returning officer prior to training.

Training revising agents is an important job. The accuracy and integrity of the electoral event depends on the ability of the revising agent to complete the tasks of revision accurately. Thank you for your efforts in making this happen.

Organization of the Training Materials for Module 3: Revision of the Lists Using Forms

Module 3: *Revision of the Lists Using Forms* involves the use of the following:

- This lesson plan
- Transparencies and a flip chart
- Materials for all training activities
- *A Manual for Revising Agents Using Forms* (EC 40233)
- *A Classroom Workbook for Revising Agents* (EC 40290)

These components have been designed to work together in a very specific way to provide the best possible training experience for the revising agents.

Lesson Plan Design (Module 3)

This lesson plan provides training officers with the information required to conduct this training session, including:






- timing and materials required to deliver each section of this course,
- directions on how to deliver content, i.e. use of flip chart, key points to cover, questions to ask, suggested answers, etc.
- instructions for conducting training activities
- the use of visual aids, i.e. transparencies

You must follow the lesson plan as it is presented to ensure that:

- training is consistent for revising agents across the country, and
- content is covered in its entirety, using the methods designed for this program.

Note: Personalize your delivery by adding your own notes in the white space of the lesson plan.

The following icons will help to guide your actions as you work with the lesson plan.

Icon	Action
	Information to be presented using an overhead transparency provided in an appendix to the lesson plan.
	Information to be presented from an additional reference source, such as an instruction manual.
	Information to be presented or recorded on a flip chart.
	A process, activity or sample to demonstrate to the class.
	A question or questions to be answered by the class.

Training Manual for Revising Agents Design

The revising agent manual is the main source of content for this training program. Each manual is divided into chapters and sections that are referred to by name in this lesson plan. The learning objectives for each part of this training program are provided on the first page of each chapter in the manual.

For evaluation purposes, there is a short multiple-choice quiz at the end of each chapter in the manual. Participants can use these questions to review the information presented in a session and to test their knowledge. The answers for these questions are provided in the Answer Key chapter at the back of the manual.

Visual Aid/Use of Samples and Training Materials

Overhead transparencies and flip chart keywords have been provided to assist in your presentation. Unless already provided, you must reproduce the overheads and prepare your own flip charts, using the suggested keywords, in advance of your training session. The program uses samples of electoral materials as visual aids and exercises in training activities. Please obtain sufficient quantities and demonstrate their proper use whenever possible during your training session.

What You Will Need – List of Supplies

Each participant requires:

- A pen or pencil
- A copy of the *Manual for Revising Agents Using Forms* (EC 40233)
- A *Classroom Workbook for Revising Agents* (EC 40290)

If the trainee has travelled more than 35 kilometres to attend the training session, a *Kilometre Log* (EC 11700) is also required to register his travel expenses.

To teach Module 3: Revision of the Lists Using Forms, you will need:

- Lesson plan
- Your copy of the *Manual for Revising Agents Using Forms* (EC 40233)
- A copy *A Classroom Workbook for Revising Agents* (EC 40290)
- Several flip chart markers, one flip chart and a stand
- Overhead transparencies (reproduced from the overheads in the appendix)
- An overhead projector and screen

To teach Module 3: Revision of the Lists Using Forms, you will need: (cont'd.)

- Samples of the following forms/documents:
 - GEO list
 - ALPHA list
 - *Transaction Log* (EC 40091)
 - *Application for Registration on the List of Electors* (EC 40110 or EC 40115)
 - *Application for Revision* (EC 40111 or EC 40116)
 - Poll key
 - Electoral District Map (one map to post on the wall)

- Prepared flip chart:
 - Agenda

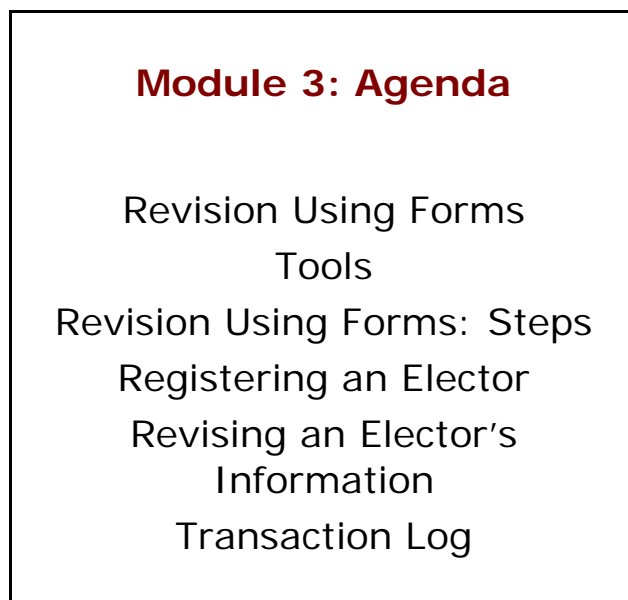
Suggestions for Conducting a Successful Training Event

- Prepare. Ensure that you understand the content and the training techniques used in the program.
- Follow the lesson plan. It has been carefully designed to ensure key content is covered thoroughly with the opportunity to practice what is learned.
- Arrange for a subject matter expert to attend training sessions to help you answer questions and clarify procedures.
- Invite questions at the appropriate time.
- Repeat key information to reinforce learning.
- When individual participants pose questions, ask the group to find the answer using their manuals.
- Answer questions when covering content unless the question will be answered later in the program.
- Show enthusiasm and be positive.
- Provide the group with feedback on their progress.
- Provide clear directions.
- Confirm understanding by asking review questions for each major section of training.
- Use examples that are familiar and relevant.
- Use language that is easy to understand. Avoid using jargon or language that is unfamiliar to participants.
- Use visual aids whenever possible.
- Manage your time carefully. There is a lot of material to cover in a short period of time.
- If there are questions that you can't answer, tell the class that you don't know and that you will find and communicate an answer as soon as possible. List the questions on a flip chart.

Thank you for your effort in conducting this training program. Good luck!

Before the Training Session:

1. Familiarize yourself thoroughly with the course materials.
2. Schedule the facilities and course participants.
3. Organize all supplies and equipment required to conduct this course, using the “*What You Will Need*” list provided for you on page 7.
4. Check the availability of an Elector Search Utility (ESU) at the training facility and be prepared to demonstrate the use of the ESU.
5. Prepare any flip charts and reproduce any overhead transparencies required for the training session. Each of the flip charts should be written neatly with coloured flip chart markers, using two-inch block letters, and should look like the following sample:



6. Allow adequate time to set up the training room.
7. Select an area in the training facility from which to work. Use a small table or podium to organize your notes and materials.



8. Set up, and practice using, the equipment necessary to conduct the course. Ensure that it is all functioning properly.
 - Illuminate and focus the overhead projector.
 - Post the electoral map.
 - Position the overhead screen and flip chart.
 - Look at the screen and chart from the back of the room to make sure all participants can see them.
9. Arrange the tables and chairs in the training facility so that they face you. Ensure you have enough chairs for the participants.



Tip: Make sure you have a spare lamp for the overhead projector and learn how to replace it. They tend to burn out frequently.

As Participants Arrive on Training Day:




1. Welcome the participants to the course.
2. Give everyone a pen (or pencil).
3. Tell participants when the session will start and direct them to take their seats in the class.
4. Confirm that participants have their *Manual for Revising Agents Using Forms* (EC 40233) and a *Classroom Workbook for Revising Agents* (EC 40290) to refer to during training.


Module 3: Revision of the Lists Using Forms (1 hour 45 min)





Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p>(5 min)</p> 	<p>Introduction to Module 3</p> <ol style="list-style-type: none"> Welcome participants to Module 3. Review the agenda using flip chart. Review the objectives for Module 3 using the overhead (#1) (Workbook page 20). Explain that paper forms in the workbook and revising agents' manual will be used to complete activities during training. 	
<p>Chapter 5</p>	<p>(3 min)</p> 	<p>Introduction to Revision Using Forms</p> <ol style="list-style-type: none"> Explain that revision using forms can take place in returning offices, satellite offices or revisal sites such as dormitories or malls. Display the overhead (#2). Explain to participants the three steps to revision (chapter 5, section 5.1). 	<ul style="list-style-type: none"> The three steps must be completed regardless of whether the elector applies in person, over the phone, or through the mail.




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>4. Ask participants to find the following documents, one at a time, and confirm the description and use of each document using the tools table in the manual.</p> <ul style="list-style-type: none"> • GEO list • ALPHA list • <i>Transaction Log</i> (EC 40091) • <i>Application for Registration on the List of Electors</i> (EC 40110 or EC 40115) • <i>Application for Revision</i> (EC 40111 or EC 40116) • Poll key <p>5. Summarize by telling participants that they will learn how to complete forms during the module.</p>	
Chapter 5	<p>(5 min)</p> 	<p>Introduction to Step 1: Conduct the Search</p> <ol style="list-style-type: none"> 1. Ask: "For every elector request, what is always the first step?" (Answer: Conduct a search.) 2. Refer participants to section 5: <i>Step 1: Conduct the search</i> of the manual. 3. Display the overhead (#3). 	<ul style="list-style-type: none"> • The first step always involves conducting a search to establish if the elector is on the preliminary list of electors.



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p style="text-align: center;">?</p> <p style="text-align: center;">?</p>	<p>4. Ask participants what tool revising agents will use first to conduct the search. (Answer: Use the GEO list.)</p> <p>5. Ask participants what tool revising agents use when they cannot find the elector after conducting a local search. (Answer: Use the ESU if available to find the elector on the National Register of Electors.)</p> <p>6. Explain that the results of Step 1: Conduct the search, determine the elector’s status on the Preliminary List of Electors, and answer the question, “Am I on the list?”</p> <p>7. Review the If/Then table in section 5.3, <i>Local search</i>.</p> <p>8. Review content in Key Points to Emphasize and refer to the flow chart wall poster.</p>	<ul style="list-style-type: none"> • Local search involves using the GEO list to search for the elector in the electoral district. • National search involves using the ESU to search for the elector on the national list of electors. • The ESU is not updated by revising agents; it is another way of determining the status of electors when they are not on the PLE. • The table helps you determine: <ul style="list-style-type: none"> ➤ the correct form to use to capture information, ➤ action that needs to be taken based on the status of the elector. • Always begin with a local search using the GEO list, and then a national search using the ESU (if available) if the elector is not found. • The results of the search always drive the type of transaction that will be completed. • Using the right form is crucial to avoid errors.




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p>	<p>(10 min)</p>   	<p>Step 1: Conduct the search</p> <ol style="list-style-type: none"> 1. Refer participants to the manual in section 5.3 and review the first half of the flow chart. 2. Explain: <ul style="list-style-type: none"> • Participants will conduct a search for two electors. • The revising agent manual should be available for reference as the task is completed. 3. Form pairs and refer participants to the workbook (Workbook page 21). 4. Display the overhead (#4). 5. Ask participants to: <ul style="list-style-type: none"> • determine the status of each elector using the GEO list on the table and assuming they have no access to the ESU, • determine the action the revising agent should take using the If/Then table in the manual. 6. Allow five minutes to complete the activity. 7. Ask for the decision relating to each elector, discuss their conclusions with the large group and refer to the flow chart. 	




Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>Results:</p> <p>Louis Pepin:</p> <ul style="list-style-type: none"> • Listed on the GEO list, does not need to be registered. • Does not need to show ID. • Address information requires revision. • Correct form to use is <i>Application for Revision</i> (EC 40111 or EC 40116). <p>Gordon Wong:</p> <ul style="list-style-type: none"> • Not listed on the GEO list and no access to the ESU. • Requires registration. • Must show proper identification. • Correct form to use is <i>Application for Registration on the List of Electors</i> (EC 40110 or EC 40115). • Elector will have to sign the form. <p>8. Ask participants what would happen if they had access to an ESU for Gordon Wong and he was not found. (Answer: The elector would be registered using the <i>Application for Registration on the List of Electors</i> [EC 40110 or EC 40115].)</p> <p>9. Summarize by highlighting the importance of identifying the status of the elector in order to determine how to proceed.</p>	<ul style="list-style-type: none"> • Use search tools effectively and efficiently in the presence of the elector.

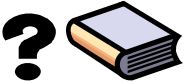

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(10 min)    	<p>Step 2: Complete the transaction</p> <p>Orientation to the <i>Application for Registration on the List of Electors</i> (EC 40110 or EC 40115)</p> <ol style="list-style-type: none"> 1. Display the overhead (#5) and explain that Step 2 involves either registering an elector or revising the elector’s information. 2. Form pairs and ask participants to turn to the <i>Application for Registration on the List of Electors</i> (EC 40110) in the workbook (Workbook page 22). 3. Refer to the section 5.3, <i>Step 2: Complete the transaction</i> of the manual and the <i>Application for Registration on the List of Electors</i>. 4. Walk through the procedure referring to the manual and the form. 	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(10 min) 	<p>Step 2: Complete the transaction</p> <p>Register Gordon Wong by completing an <i>Application for Registration on the List of Electors</i> (EC 40110 or EC 40115)</p> <ol style="list-style-type: none"> 1. Ask participants to complete an <i>Application for Registration on the List of Electors</i> (EC 40110) for Gordon Wong using: <ul style="list-style-type: none"> • the manual, section 5.3, • the information in the workbook on pages 21 and 23, • the form in the workbook (Workbook page 22). 2. Allow five minutes to complete the form. 3. Debrief and confirm the accuracy of the work using the <i>Application for Registration on the List of Electors</i>. 	
Chapter 5	(5 min)  	<p>Step 3: Validate the Transaction</p> <ol style="list-style-type: none"> 1. Refer to the manual, section 5.3. 2. Explain that Step 3 involves validating the transaction to ensure that all the requirements have been met. 3. Display the overhead (#6). 	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>4. Review the questions.</p> <p>5. Review the procedure for the validation questions and the If/Then table using the overhead in section 5.3, <i>Step 3: Validate the transaction</i> in the manual.</p>	
Chapter 5	<p>(5 min)</p> <p></p> <p></p>	<p>Step 3: Validate the Transaction – Application for Registration on the List of Electors (EC 40110 or EC 40115)</p> <p>1. Ask participants to use the manual and the information provided in the workbook about Gordon Wong to determine which validation questions would apply to this transaction. (Answer: All but proof of death.) (Workbook page 24)</p> <p>2. Ask what the revising agent must do with the form after all requirements have been met. (Answer: Sign the form and have your partner check and sign the form.)</p> <p>3. Ask participants to complete the transaction.</p> <p>4. Congratulate participants for successfully registering the elector.</p> <p>5. Highlight the section titles on the <i>Application for Registration on the List of Electors</i> using the wall poster.</p>	<ul style="list-style-type: none"> • Make sure you sign the form and that your partner checks the form before signing. • The instructions for completing this form are in the manual.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(2 min) 	<p>Re-introduction of elector – Louis Pepin</p> <ol style="list-style-type: none"> 1. Reintroduce the elector Louis Pepin. 2. Refer participants back to page 21 of the workbook. 3. Ask participants the results of their search and the correct form to use. (Revision of address, using an <i>Application for Revision</i> [EC 40111 or EC 40116].) 4. Refer to the flow chart in section 5.3 and the need to revise Louis Pepin. 	
Chapter 5	(10 min)  	<p>Step 2: Complete the Transaction</p> <p>Orientation to the <i>Application for Revision</i> (EC 40111 or EC 40116)</p> <ol style="list-style-type: none"> 1. Form pairs and ask participants to turn to the <i>Application for Revision</i> (EC 40111 or EC 40116) in the workbook (Workbook page 25). 2. Refer to section 5.3 of the manual. 3. Walk through the procedure referring to the manual and the form. 	

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	(10 min)   	<p>Step 2: Complete the Transaction Revise Louis Pepin by Completing an <i>Application for Revision</i> (EC 40111 or EC 40116)</p> <ol style="list-style-type: none"> Ask participants to complete an <i>Application for Revision</i> (EC 40111) for Louis Pepin using: <ul style="list-style-type: none"> the manual, section 5.3, the information in the workbook on page 26, the form in the workbook (Workbook page 25). Allow five minutes to complete the form. Debrief and confirm the accuracy of the work using the <i>Application for Revision</i>. Display the overhead (#7). Ask participants: <ul style="list-style-type: none"> What would be different if the revision were completed over the phone? (Answer: Nothing.) What would you do differently if the applicant making the revision request did not live at the same address as the elector? (Answer: The applicant must provide a letter of authorization and identification for himself.) What does the elector need to do if the correction involves a legal name change? (Answer: The elector must sign the form.) 	<ul style="list-style-type: none"> Make sure you confirm the type of revision required with the elector and tick the correct box on the form.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	<p>(5 min)</p> <p></p> <p></p>	<p>Step 3: Validate the Transaction – <i>Application for Revision</i> (EC 40111 or EC 40116)</p> <ol style="list-style-type: none"> 1. Ask participants to use the manual, section 5.3, and information in the workbook about Louis Pepin (Workbook page 27) to determine which validation questions would not apply to this transaction. <p><i>Answers</i></p> <ol style="list-style-type: none"> 1. Signing the form 2. Providing ID 3. Opting out of the NRoE 4. Proof of death <ol style="list-style-type: none"> 2. Ask what the revising agent must do with the form after all requirements have been met? (Answer: Sign the form and have his partner check and sign the form.) 3. Ask participants to validate the transaction. 4. Congratulate participants for successfully revising the elector’s information. 	<ul style="list-style-type: none"> • Make sure you sign the form and that your partner checks the form before signing.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 6	(5 min)  	<p>Completing the <i>Transaction Log</i> (EC 40091)</p> <ol style="list-style-type: none"> 1. Explain that the <i>Transaction Log</i> (EC 40091) is a form that is completed when an elector request can't be completed and some type of follow-up is required by the revising agent. 2. Ask participants to find the section in the manual that tells them how to complete the <i>Transaction Log</i> (EC 40091). (Answer: Chapter 6, section 6.2) 3. Review the procedure for completing the <i>Transaction Log</i> (EC 40091) using the sample in the workbook and the manual (Workbook page 18). 	<ul style="list-style-type: none"> • The <i>Transaction Log</i> (EC 40091) is a quality control measure to ensure that every opportunity is provided to the elector to register or revise information. • Make sure entries are detailed enough that another revising agent would be able to follow up with the elector.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 5</p>	<p>(5 min)</p>  	<p>Revision Using Forms Summary</p> <ol style="list-style-type: none"> 1. Refer participants to the flow chart in section 5.1 in the manual. 2. Review the steps for revision using forms using the flow chart in the manual. 3. Form pairs. 4. Ask each pair to complete the review questions in the workbook (Workbook page 28). 5. Ask participants to complete the section checkpoint questions for revision using forms in the workbook. 6. Ask participants if they have any questions about the content covered in Module #3. 7. Answer questions from participants. 8. Thank participants for attending the training session. 	

Revising Agent Training Program: Module 3

Module 3 Agenda

Revision Using Forms

Tools

Revision Using Forms: Steps

Registering an Elector

Revising an Elector's Information

Transaction Log

Total Training Time – 1 hour 45 minutes

Module 3: Objectives

By the end of this module, you will be able to:

- **follow the procedures to register or revise an elector,**
- **complete the *Transaction log*.**

The Three Steps of Revision

- Conduct the search.
- Perform the transaction.
- Validate the transaction.

Step 1: Conduct the Search

- **Conduct:**
 - a local search,
- **And if the elector is not found, conduct:**
 - a national search.
- **Determine the elector's status on the PLE.**
- **Answer the question, "Am I on the list?"**

Revising Agent Training Program: Module 3

Elector A: Louis Pepin
1052 Ramsgate
Kimberly, ON
D9E 2J7
Date of Birth: October 19, 1954

Louis wants to make sure he is on the list of electors. He has received a voter information card (VIC) for someone who does not live at his address. Louis lives alone.

Elector B: Gordon Wong
1050 Ramsgate
Kimberly, ON
D9E 2J7
Date of Birth: May 5, 1978

Gordon wants to register to vote for the first time since becoming a Canadian citizen.

Revising Agent Training Program: Module 3

Step 2: Perform the Transaction

- Revise the elector information.
- Register the elector.

Validate the Transaction

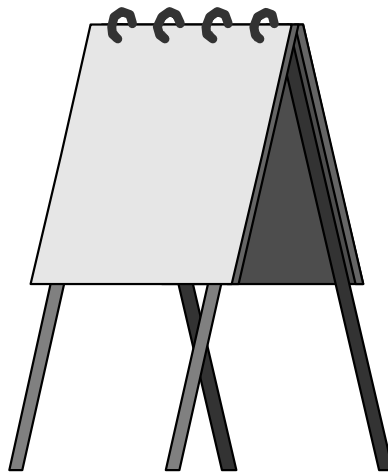
1. Did the elector sign the form if it was required?
2. Did the elector provide ID if it was required?
3. Did I tick the VIC box?
4. Did the elector opt out of the NRoE if it was an option?
5. Did the applicant present proof of death if it was required?

Performing the Transaction

- What would be different if the revision were performed over the phone?
- What would you do differently if the applicant making the revision request did not live at the same address as the elector?
- What does the elector need to do if the correction involves a legal name change?

Revision of the Lists of Electors Election

Lesson Plan Module 4: Targeted Revision



July 2009

Introduction to the Revising Agent Training Program

Welcome to the Revising Agent Training Program. This comprehensive document acts as a training officer's guide to leading a classroom training session for revising agents.

There are four modules in the training program:

Module 1: Introduction

Module 2: Revision of the Lists of Electors Using the REVISE System

Module 3: Revision of the Lists Using Forms

Module 4: Targeted Revision

There are three revising agent manuals and one of the three manuals will be used with each lesson plan:

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Training revising agents is an important job. The accuracy and integrity of the electoral event depends on the ability of the revising agent to complete the tasks of revision accurately. Thank you for your efforts in making this happen.

Organization of the Training Materials

Module 4: *Targeted Revision* involves the use of the following:

- This lesson plan
- Transparencies and a flip chart
- Materials for all training activities
- *A Manual for Revising Agents Doing Targeted Revision* (EC 40232)
- *A Classroom Workbook for Revising Agents* (EC 40290)

These components have been designed to work together in a very specific way to provide the best possible training experience for the revising agents.

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This lesson plan provides training officers with the information required to conduct this training session, including:






- timing and materials required to deliver each section of this course
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- training is consistent for revising agents across the country, and
- content is covered in its entirety, using the methods designed for this program.

Note: Personalize your delivery by adding your own notes in the white space of the lesson plan.

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For evaluation purposes, there is a short multiple-choice quiz at the end of each chapter in the manual. Participants can use these questions to review the information presented in a session and to test their knowledge. The answers for these questions are provided in the Answer Key chapter at the back of the manual.

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- A *Classroom Workbook for Revising Agents* (EC 40290)

If the trainee has travelled more than 35 kilometres to attend the training session, a *Kilometre Log* (EC 11700) is also required to register his travel expenses.

To teach Module 4: Targeted Revision, you will need:

- Lesson plan
- Your copy of *A Manual for Revising Agents Doing Targeted Revision* (EC 40232)
- A copy of *A Classroom Workbook for Revising Agents* (EC 40290)
- Several flip chart markers, one flip chart and a stand
- Overhead transparencies (reproduced from the overheads in the appendix)
- An overhead projector and screen
- Application for Registration – Targeted Revision at Elector's Residence* (EC 40113 or EC 40118)

To teach Module 4: Targeted Revision, you will need: (cont'd.)

Samples of the following forms/documents:

- GEO list
- *Application for Registration – Targeted Revision at Elector’s Residence* (EC 40113 and EC 40118)
- Brochure: *Your name may not be on the federal voters list* (with form EC 40112 or EC 40117)
- *Targeted Revision – Summary of Visits* (EC 40106)
- *We Missed You* cards (EC 40108)
- Bilingual service cards (EC 40109)
- Polling division map

Prepared flip chart:

- Agenda

Suggestions for Conducting a Successful Training Event

- Prepare. Ensure that you understand the content and the training techniques used in the program.
- Follow the lesson plan. It has been carefully designed to ensure key content is covered thoroughly with the opportunity to practise what is learned.
- Arrange for a subject matter expert to attend training sessions to help you answer questions and clarify procedures.
- Invite questions at the appropriate time.
- Repeat key information to reinforce learning.
- When individual participants pose questions, ask the group to find the answer using their manuals.
- Answer questions when covering content unless the question will be answered later in the program.
- Show enthusiasm and be positive.
- Provide the group with feedback on their progress.
- Provide clear directions.
- Confirm understanding by asking review questions for each major section of training.
- Use examples that are familiar and relevant.
- Use language that is easy to understand. Avoid using jargon or language that is unfamiliar to participants.
- Use visual aids whenever possible.
- Manage your time carefully. There is a lot of material to cover in a short period of time.
- If there are questions that you can't answer, tell the class that you don't know and that you will find and communicate an answer as soon as possible. List the questions on a flip chart.

Thank you for your effort in conducting this training program. Good luck!

Before the Training Session:

1. Familiarize yourself thoroughly with the course materials.
2. Schedule the facilities and course participants.
3. Organize all supplies and equipment required to conduct this course, using the *“What You Will Need”* list provided for you on page 7.
4. Prepare any flip charts, reproduce any overhead transparencies required for the training session. Each of the flip charts should be written neatly with coloured flip chart markers, using two-inch block letters, and should look like the following sample:

Module 4: Agenda

Introduction to Targeted Revision

Targeted Revision: New Residential and High Mobility Areas:

- Tools
- Procedures
- Registering an Elector
- Record of Visits

Targeted Revision: Institutions, Nursing Homes and Chronic Care Facilities

- Tools
- Procedures
- Registering an Elector



5. Allow adequate time to set up the training room.
6. Select an area in the training facility from which to work. Use a small table or podium to organize your notes and materials.
7. Set up and practise using the equipment necessary to conduct the course. Ensure that it is all functioning properly.
 - Illuminate and focus the overhead projector.
 - Post the electoral map and some sample forms on the walls for the participants to look at.
 - Position the overhead screen and flip chart.
 - Look at the screen and chart from the back of the room to make sure all participants can see them.
8. Arrange the tables and chairs in the training facility so that they face you. Ensure you have enough chairs for the participants.



Tip: Make sure you have a spare lamp for the overhead projector and learn how to replace it. They tend to burn out frequently.


As Participants Arrive on Training Day:


1. Welcome the participants to the course.
2. Arrange for someone to register the participants.
3. Give everyone a pen (or pencil).
4. Tell participants when the session will start and direct them to take their seats in the class.
5. Confirm that participants have a copy of *A Manual for Revising Agents Doing Targeted Revision* (EC 40232).




Module 4: Targeted Revision (1 hour 30 min)



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p>(3 min)</p> 	<p>Introduction to Module 4</p> <ol style="list-style-type: none"> Welcome participants to Module 4. Review the agenda using flip chart #1. Review the objectives for Module 4 using the overhead (#1) (Workbook page 29). Explain that paper forms in the workbook and revising agent manual for targeted revision will be used to complete activities during training. 	
<p>Chapter 5</p>	<p>(3 min)</p> 	<p>Introduction to Targeted Revision</p> <ol style="list-style-type: none"> Display the overhead (#2) and review the what, why and where of targeted revision (Workbook page 29). Explain to participants the three steps to revision and that the same steps apply when visiting electors during targeted revision activities. Explain that the procedures will be reviewed using forms in the workbook and the revising agent manual. 	<ul style="list-style-type: none"> Targeted revision involves revising agents going into the community to register electors, rather than electors coming to the office.


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
<p>Chapter 8 Appendix</p>	<p>(5 min)</p>  	<p>Targeted Revision Tools:</p> <p>New Residential and High Mobility Areas</p> <ol style="list-style-type: none"> 1. Refer to the list of tools for conducting revision in new residential and high mobility areas in the manual in section 8.3 2. Refer participants to the forms on the table and the tools table in the manual. 3. Ask participants to find the following documents, one at a time, and confirm the description and use of each document using the chapter 8, Appendix in the manual. <ul style="list-style-type: none"> • GEO list • <i>We Missed You</i> cards (EC 40108) • <i>Bilingual Service Cards</i> (EC 40109) • <i>Application for Registration – Targeted Revision at Elector’s Residence</i> (EC 40113 or EC 40118) • Brochure: <i>Your name may not be on the federal voters list</i> (with form EC 40112 or EC 40117) • <i>Targeted Revision – Record of Visits</i> (EC 40106) • Polling division maps 	


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>4. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> Targeted Revision Kits contain everything revising agents will need to conduct targeted revision. The revision supervisor will provide each pair of revising agents with a targeted revision kit, which includes all the materials you will require.
<p>Chapter 5</p>	<p>(4 min)</p> 	<p>Preparations for Going Door to Door</p> <ol style="list-style-type: none"> 1. Explain that, prior to going door to door, the revising agent needs to prepare and organize his work. 2. Display the overhead (#3). 3. Review the preparation steps listed in the manual in section 5.3. 	
<p>Chapter 5</p>	<p>(5 min)</p>	<p>Completing the <i>Targeted Revision – Record of Visits</i> Form (EC 40106)</p> <ol style="list-style-type: none"> 1. Form pairs and ask participants to turn to the <i>Targeted Revision – Record of Visits</i> (EC 40106) in the workbook (Workbook page 30). 2. Explain that each pair of revising agents will be given a <i>Targeted Revision – Record of Visits</i> (EC 40106) form. 	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>3. Refer to the form in the workbook and the procedure in the manual in section 5.3 (Workbook page 30).</p> <p>4. Walk through the procedure, referring to the manual and the form and making sure to identify:</p> <ul style="list-style-type: none"> • sections of the form completed by the revision supervisor, • sections of the form completed by the revising agent and the information they will record on the form. <p>5. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> • Parts of the form will be completed by the revision supervisor. • Other parts of the form will be completed by the revising agents as they conduct their visits. • Review the <i>Targeted Revision – Record of Visits</i> form (EC 40106) before you start your visits. • Review the GEO list to identify the addresses or street ranges you will visit to save time.
Chapter 5	(15 min)	<p>Procedures for New Residential and High Mobility Areas</p> <p>1. Explain that the procedure for conducting door-to-door visits for new residential and high mobility areas is the same.</p>	



Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	  	<p>2. Refer to the manual, section 5.3, display the overhead (#4) and review the procedures in the manual for conducting a first visit, linking it to the three steps of revision.</p> <p>3. Display the overhead (#5).</p> <p>4. Ask the following questions to confirm understanding:</p> <ul style="list-style-type: none"> • Is asking the elector “Does Joe Smith live here?” an acceptable question to ask and why? (Answer: No, the confidentiality of the elector is not protected in this case.) • Can the elector still register if he has no proof of ID or residence? (Answer: Yes, the elector at home can register himself and all the electors who share the same residence. The prescribed oath must be taken and the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> form [EC 40113 or EC 40118] signed.) 	<ul style="list-style-type: none"> • Step 1: Conduct the search. This step is completed at the door with the elector using the GEO list. • Step 2: Complete the transaction. This step is completed at the door when the revising agent registers the elector or confirms correct registration. • Step 3: Validate the transaction. This step is completed when the elector either shows proof of ID or takes the required oath and his signature is obtained. Note that an oath may be sworn by an elector found at home as proof of ID and residence for all electors living at that residence.


Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	 	<ul style="list-style-type: none"> • What does the revising agent ask before he asks the elector to sign the form and why? (Answer: Ask if there are any other electors residing at the address, to confirm that there are no other eligible electors in the household.) • What do you do if the elector is not home? (Answer: Make the correct entry in the <i>Targeted Revision – Record of Visits</i> [EC 40106] form and leave a <i>We Missed You</i> card.) <p>5. Review the follow-up required after first visits have been completed.</p> <p>6. Refer to the manual in section 5.3, Second Visit, and explain that the revising agent will follow the same steps when finding the elector home on a second visit to the address.</p> <p>7. Ask participants: “What do you do if no one is home when you conduct the second visit?” (Answer: Leave the brochure <i>Your name may not be on the federal voters list</i> [EC 40112 or EC 40117] and make the correct entry in the <i>Targeted Revision – Record of Visits</i> form [EC 40106].)</p>	<ul style="list-style-type: none"> • It is important to communicate the results of targeted revision to the revision supervisor on a daily basis. • Never share the names of electors on the GEO list with people you visit. • Neither proof of identity nor proof of residence is required if the elector takes the prescribed oath and signs the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> form (EC 40113 or EC 40118).

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>8. Review the general follow-up procedures in section 5.3.</p> <p>9. Review content in Key Points to Emphasize.</p>	<ul style="list-style-type: none"> • Door-to-door visits take place in three different time slots (9-12, 12-6, 6-9). • The revising agent must ensure that they complete second visits in a different time slot than the first visit.
Chapter 5	(10 min) 	<p>Orientation to the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> (EC 40113 or EC 40118)</p> <ol style="list-style-type: none"> 1. Form pairs and ask participants to turn to the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> (EC 40113) in the workbook (Workbook page 31). 2. Refer the section 5.3 of the manual. 3. Ask participants to look at the form in the workbook and refer to the procedure to complete the form in the manual. 4. Walk through the procedure referring to the manual and the form. 	<ul style="list-style-type: none"> • Make sure both revising agents sign registration forms.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
Chapter 5	<p>(10 min)</p> 	<p>Completing an <i>Application for Registration – Targeted Revision at Elector’s Residence</i> (EC 40113 or EC 40118)</p> <ol style="list-style-type: none"> 1. Explain that participants will practice completing forms by revising each other. 2. Form pairs and ask each pair to decide who will be the revising agent and who will be the elector at the door. 3. Ask participants to follow the procedures in the manual, section 5.3, and the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> form (EC 40113) (Workbook page 31) to conduct targeted revision for the designated elector as follows: <ul style="list-style-type: none"> • The revising agent should “knock” and the elector will not answer the “door” on the first visit. • The revising agent must record the visit on the <i>Record of Visits</i> form in the workbook. • The revising agent will then “knock” a second time and the elector will answer the “door”. 4. Allow 10 minutes to complete the activity. 	<ul style="list-style-type: none"> • Make sure to check the correct box in section 6 at the bottom of the form if ALL eligible electors at that address appear on the registration form. That will tell revising agents or revision centre clerks entering the information in REVISE to remove any electors not appearing on the form, but who are registered at that address. • Valid electors WILL be deleted from the list by mistake if the box “Yes – Remove other electors at that address” is checked off in error.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<p>5. Debrief and confirm the accuracy of the work using the trainers' sample.</p> <p>6. Congratulate participants on registering an elector during targeted revision in a new development.</p>	<ul style="list-style-type: none"> Targeted revision in residential and high mobility areas is similar to targeted revision in institutions, nursing homes and chronic care facilities. The preparation tasks are different.
<p>Chapter 5</p>	<p>(3 min)</p> 	<p>Targeted Revision Tools:</p> <p>Institutions, Nursing Homes and Chronic Care Facilities</p> <p>1. Review the list of tools in the manual in section 5.4.</p> <p>2. Explain that the facility may choose to share a list of residents living there, but is not obliged to do so. They can also ask to review a list of electors for the facility.</p>	
<p>Chapter 5</p>	<p>(10 min)</p> 	<p>Preparations for Conducting Targeted Revision in Institutions, Nursing Homes and Chronic Care Hospitals</p> <p>1. Refer to the manual, section 5.4.</p> <p>2. Display the overhead (#6).</p>	

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	 	<ol style="list-style-type: none"> 3. Explain that the administrator of the facilities that revising agents will visit may choose to share a list of residents living there but are not obliged to do so. They can also ask to review a list of electors for the facility. 4. Review the three options as outlined in the manual. 5. Emphasize that different forms will be used depending on the option chosen. 6. Display the overhead (#7), review the procedure in the manual for Option 1 in section 5.4 and link the three steps of revision. 7. Review the procedures for Option 2 using the manual, section 5.4, and the overhead (#8). 8. Review the procedures for Option 3 using the manual, section 5.4, and the overhead (#9). 9. Summarize by highlighting that preparation depends on the option selected by the administrator of the facility. 	<ul style="list-style-type: none"> • The revision supervisor will make arrangements in advance with the administrator of the facilities that you will visit. • Step 1: Conduct the search using the GEO list. • Step 2: Complete the transaction by registering the elector or revising his information. • Step 3: Validate the transaction by asking the elector to take the oath and sign the <i>Application for Registration – Targeted Revision at Elector’s Residence</i> (EC 40113 or EC 40118) form. • Maintain a customer service mindset when speaking with residents, facility staff or the administrator. • Make every attempt to accommodate the schedule of the facility and the needs of the residents you visit. • Pre-filling forms saves you and the residents time.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
		<ul style="list-style-type: none"> • The designated elector should provide adequate information for the revising agent to complete the form. • Consider the following factors: <ul style="list-style-type: none"> ➤ The revising agent does not find the elector on the GEO list. ➤ The elector understands the purpose of your visit. • Begin by greeting the elector. <p>3. Allow 10 minutes to complete the activity.</p> <p>4. Debrief and confirm the accuracy of the work.</p> <p>5. Refer to section 5.4 of the manual and ask participants what they would do if they felt the elector did not understand the purpose of their visit. (Answer: Consult with the staff and then write on the form the required statement.)</p> <p>6. Congratulate participants on successfully registering an elector during targeted revision in the nursing home.</p>	<ul style="list-style-type: none"> ▪ According to the <i>Canada Elections Act</i>, an elector suffering from mental illness or degenerative disease has the right to vote. Mental capacity is not a qualification to vote. If the elector can answer the basic questions relating to qualification to vote, you must register him.

Manual Reference	Time/Action	What to Do	Key Points to Emphasize
	<p>(5 min)</p> <p>?</p>	<p>Module 4: Summary</p> <ol style="list-style-type: none"> 1. Form pairs. 2. Ask each pair to complete the review questions for targeted revision in the workbook (Workbook pages 33 and 34). 3. Ask participants if they have any questions about the content covered in Module 4. 4. Answer questions. 5. Thank participants for coming. 	

Module 4 Agenda

Introduction to Targeted Revision

Targeted Revision: New Residential and High Mobility Areas

- Tools
- Procedures
- Registering an Elector
- *Record of Visits*

Targeted Revision: Institutions, Nursing Homes and Chronic Care Facilities

- Tools
- Procedures
- Registering an Elector

Total Training Time – 1 hour 30 minutes

Module 4: Objectives

By the end of this module, you will be able to:

- follow the procedures to register an elector,
- complete the *Record of Visits*,

Targeted Revision

What?

- Revising agents work in pairs to go door to door or visit facilities to revise or register electors.

Why?

- To ensure that all qualified electors in a specific location or area are registered to vote.

Where?

- Institutions, nursing homes and chronic care facilities.
- Areas of high mobility.
- New residential developments.
- Other areas designated by the RO.

Preparations for Going Door to Door

- **Ensure you have enough forms for the number of homes you will visit.**
- **Ensure brochures are stamped with the address of the office of the returning officer.**
- **Review GEO list to identify addresses or street ranges you will visit.**
- **Find out which homes or units are unoccupied in new residential areas.**

**Targeted Revision in New Residential and
High Mobility Areas**

First visit:

- Greet the resident.
- Explain the purpose of your visit.
- Confirm electors that are registered using the GEO list.
- Register electors not on the GEO list.
- Confirm there are no other qualified electors in the household.

Targeted Revision in New Residential and High Mobility Areas

- The revising agent asks the elector:
 “Does Joe Smith live here?”
 Is this an acceptable question to ask and why?
- Why is it unnecessary to ask for proof of identity or residency?
- What does the revising agent ask before asking the elector to sign the form, and why?
- What do you do if the elector is not home on the first visit?

Preparation for Conducting Targeted Revision in Institutions, Nursing Homes and Chronic Care Hospitals

- Option 1: The institution provides a list of residents before revision begins.**
- Option 2: The institution provides a list of residents for on-site consultation.**
- Option 3: A list of residents is not provided.**

**Targeted Revision in Institutions, Nursing Homes and
Chronic Care Hospitals**

Option 1: A list of residents is provided in for on-site consultation

- **Search for the electors on the GEO list using the list provided by the facility.**
- **Determine the correct transaction required and pre-fill application forms.**
- **Visit the elector during planned days of the electoral calendar and validate the transaction.**

Targeted Revision in Institutions, Nursing Homes and Chronic Care Hospitals

Option 2: A list of residents is provided for on-site consultation

- **Search for the electors on the GEO list using the list provided by the facility.**
- **Determine the correct transaction required and pre-fill *Application for Registration – Targeted Revision at Elector's Residence* for electors not found on GEO.**
- **Visit the elector during planned days of the electoral calendar and validate the transaction.**

**Targeted Revision in Institutions, Nursing Homes and
Chronic Care Hospitals**

Option 3: A list is not provided by the facility

- Visit each elector and attempt to find him on the GEO list.
- Complete an *Application for Registration – Targeted Revision at Elector's Residence* form for each elector not found on the GEO list.
- Validate the transaction.