Public Opinion Research
Final Report Checklist

Requirements and General Advice

Updated June 2016
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INTRODUCTION

The Library and Archives of Canada Act requires federal institutions entering into a contract for Public Opinion Research (POR) to send a written report of the research in both official languages to Library and Archives Canada (LAC) within six months after the completion of the data collection. The Public Opinion Research Contracting Regulations also require that the person entering into a POR contract consent to the publication by LAC of the POR narrative executive summary in both official languages.

This document will help you ensure that all the required information is included in your report prior to submitting it to LAC. This includes all requirements in the Public Opinion Research Contracting Regulations, the Directive on the Management of Communications and LAC Reporting Instructions.
I. OVERVIEW OF THE STEPS: NARRATIVE EXECUTIVE SUMMARY AND FINAL REPORT

The following steps should be followed prior to submitting the narrative executive summary and the final report to Library and Archives Canada:

**STEP 1: REVIEW THE NARRATIVE EXECUTIVE SUMMARY AND FINAL REPORT**

Review the narrative executive summary and final report to ensure all report requirements including the standards for public opinion research have been met.

Standards for the Conduct of Government of Canada Public Opinion Research:

- Online surveys
- Telephone surveys
- Qualitative research

Departments are responsible for the content, conformity with, and quality of their POR narrative executive summary and final report. Please carefully review your reports prior to depositing, using the report requirements (see Sections II and III below) to ensure that the report is complete. Although guidance is available from Library and Archives Canada (LAC) at the point of deposit, LAC is not responsible for ensuring that deposited POR conforms with or includes all required components as stipulated in the Public Opinion Research Contracting Regulations or the Directive on the Management of Communications.

**STEP 2: RECEIVE THE POLITICAL NEUTRALITY CERTIFICATION**

Each contract includes provisions for the contractor to submit a political neutrality certification. You must ensure you receive this certification from the supplier upon receipt of final reports (see Appendix 2 entitled “Political Neutrality Certification” for details).

**STEP 3: DEPOSIT THE NARRATIVE EXECUTIVE SUMMARY AND FINAL REPORT**

Separate English and French narrative executive summaries and final reports must be provided in electronic format to LAC. LAC makes the electronic reports available to the public via the Public Opinion Research Report website.

The Treasury Board of Canada Secretariat’s Web standards apply to the content and the format of public opinion research narrative executive summaries and final reports. For more information, please refer to the Standards on Web Accessibility. The following advice could assist you in meeting their requirements.
Web Accessibility advice for public opinion research narrative executive summary and final report

✓ Avoid relying on software that Canadians are unlikely to have installed or enabled on their personal computer. Ensure all sections of the report are compatible with common assistive technologies such as screen readers.

✓ Align content with the top left of the page and ensure a consistent left-to-right, top-to-bottom flow (e.g. prefer continued text to column display. This makes viewing the documents more convenient for readers).

✓ Use a non-cursive font such as Arial or Verdana and avoid small font sizes.

✓ Avoid relying on colour to communicate information and ensure high contrast between foreground and background (e.g. prefer dark colours like burgundy or forest green). Please avoid light colours as some readers may not be able to see them.

✓ Ensure that you can navigate through the report without the use of a mouse.

✓ Avoid complex or uncommon terms or unnecessarily long sentences.

✓ The report should be deposited electronically. If a request is made for a print version, this should be provided to the individual.

Best Practice

Provide table and graphic text alternatives

Provide text alternatives for any non-text content so that it can be changed into other [formats] people need, such as large print, Braille, speech, symbols or simpler. A best practice is to ensure that the information included in table and graphic representations is also available in text.
II. REPORT REQUIREMENTS AND GOVERNMENT OF CANADA STANDARDS

Four separate documents must be submitted to LAC:
- the narrative executive summary in English;
- the narrative executive summary in French;
- the final report which must include the full research findings and appendices in English; and
- the final report which must include the full research findings and appendices in French.

1. THE NARRATIVE EXECUTIVE SUMMARY

The narrative executive summary should include the following:

1.1 Information that should appear on the cover page:

✓ The POR registration number as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
✓ the contract number, as assigned by Public Works and Government Services Canada (PWGSC), and the contract award date;
✓ the delivery date (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research supplier to the Project Authority);
✓ the title of the project same as the title included in the POR plan;
✓ the name of the research supplier that entered into the contract;
✓ the name of the client department or agency sponsoring the research;
✓ for the English version, the statement “Ce rapport est aussi disponible en français.” and for the French version, the statement “This report is also available in English.”; and
✓ the departmental contact information in the form of a generic email address.

For an example of the cover page, please see Appendix 3.

1.2 Information that should be included in the narrative executive summary:

✓ a statement of the research purpose and objectives;
✓ a summary of key findings;
✓ an outline of how the results were used, if possible, and if not, how the information is expected to be used;
✓ a brief description of the methodology used;
✓ a statement as to the extent to which the findings can be extrapolated to a broader audience; and
✓ the total contract value of the POR project.

Please note that graphics, charts, and tables should not be included in the narrative executive summary.

1 This applies to all POR reports except fieldwork and data tabulation reporting requirements. These are described separately below.
2. **THE FINAL REPORT**

The final report should include the following:

2.1 Information that should appear on the **cover page**:

- The **POR registration number** as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
- the **contract number**, as assigned by Public Works and Government Services Canada (PWGSC), and the **contract award date**;
- the **delivery date** (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research supplier to the Project Authority);
- the **title of the project** same as the title included in the POR plan;
- the **name of the research supplier** that entered into the contract;
- the **name of the client department or agency** sponsoring the research;
- for the English version, the statement “*Ce rapport est aussi disponible en français.*” and for the French version, the statement “*This report is also available in English.*”; and
- the **departmental contact information** in the form of a generic email address.

*For an example of the cover page, please see Appendix 3.*

2.2 Information that should be included in the final reports:

- the **narrative executive summary**;
- the full **results findings**; and
- the **appendices** according to the type of research:
  a) quantitative research:
    - a full set of tabulated data;
    - sample size, sampling procedures, and dates of research fieldwork;
    - weighting procedures, confidence interval, and margin of error;
    - response rate and method of calculation;
    - a discussion of the potential for non-response bias;
    - the research instruments in all languages and, if applicable, the test material in all languages in which they were used and tested; and
    - all other information about the execution of the fieldwork that would be needed to replicate the research initiative.
  b) qualitative research:
    - the research instruments in all languages and, if applicable, the test material in all languages in which they were used and tested; and
    - all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.

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III. Specific Requirements for the Fieldwork and Data Tabulation Projects

Such as Advertising Campaign Evaluation Tool (ACET) final methodological reports

Four separate documents must be submitted to LAC:

- the narrative executive summary in English;
- the narrative executive summary in French;
- the final methodological report which must include the full description of the methodology used and all applicable appendices within the same document in English; and
- the final methodological report which must include the full description of the methodology used and all applicable appendices within the same document in French.

1. The Narrative Executive Summary

The narrative executive summary should include the following:

1.1 Information that should appear on the cover page:

- The POR registration number as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
- the contract number, as assigned by Public Works and Government Services Canada (PWGSC), and the contract award date;
- the delivery date (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research supplier to the Project Authority);
- the title of the project same as the title included in the POR plan;
- the name of the research supplier that entered into the contract;
- the name of the client department or agency sponsoring the research;
- for the English version, the statement “Ce rapport est aussi disponible en français.” and for the French version, the statement “This report is also available in English.”; and
- the departmental contact information in the form of a generic email address.

For an example of the cover page, please see Appendix 3.

1.2 Information that should be included in the narrative executive summary:

- a statement of the research purpose and objectives;
- an outline of how the results were used, if possible, and if not, how the information is expected to be used;
- a brief description of the methodology used;
- a statement as to the extent to which the findings can be extrapolated to a broader audience; and
- the total contract value of the POR project.

Please note that graphics, charts, and tables should not be included in the narrative executive summary.

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2. THE FINAL METHODOLOGICAL REPORT

The final methodological report should include the following:

2.1 Information that should appear on the cover page:

✓ The POR registration number as assigned by Public Opinion Research Directorate (PORD), preferably in the upper right-hand corner;
✓ the contract number, as assigned by Public Works and Government Services Canada (PWGSC), and the contract award date;
✓ the delivery date (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research supplier to the Project Authority);
✓ the title of the project same as the title included in the POR plan;
✓ the name of the research supplier that entered into the contract;
✓ the name of the client department or agency sponsoring the research;
✓ for the English version, the statement “Ce rapport est aussi disponible en français.” and for the French version, the statement “This report is also available in English.”; and
✓ the departmental contact information in the form of a generic email address.

For an example of the cover page, please see Appendix 3.

2.2 Information that should be included in the final methodological report:

✓ the narrative executive summary;
✓ the appendices as described below:
  ➢ a full set of tabulated data;
  ➢ sample size, sampling procedures, and dates of research fieldwork;
  ➢ weighting procedures, confidence interval, and the margin of error;
  ➢ the response rate and method of calculation;
  ➢ a discussion of the potential for non-response bias;
  ➢ the research instruments in all languages and, if applicable, the test material in all languages in which they were used and tested; and
  ➢ all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.

3. NOTIFICATION TO LIBRARY AND ARCHIVES CANADA FOR FIELDWORK AND DATA TABULATION PROJECT

When you are submitting a final methodological report to Library and Archives Canada (LAC), you must notify LAC in the comments section of the online report submission page that “This is a final methodological report.”
IV. INSTRUCTIONS FOR SUBMITTING THE NARRATIVE EXECUTIVE SUMMARY AND FINAL REPORT AT LIBRARY AND ARCHIVES CANADA (LAC)

These documents must be submitted to LAC in separate files:
- the narrative executive summary in English;
- the narrative executive summary in French;
- the final report / final methodological report must include the full description of the methodology used and all applicable appendices within the same document in English; and
- the final report / final methodological report must include the full description of the methodology used and all applicable appendices within the same document in French.

Departments and agencies should submit electronic copies of their narrative executive summaries and final reports / final methodological reports.

Instructions for submission of narrative executive summaries and final reports to LAC:

Please visit the LAC website for Public Opinion Research Reports (PORR) deposit at http://www.porr-rrop.gc.ca/ and choose “Submit a report.”

Step 1: Enter the POR Registration Number (listed on the first page of the contract). Then specify what types of files are being submitted (i.e. narrative executive summaries with electronic final report files in English and French).

Step 2: Attach the electronic files (Choose Method A or Method B). NOTE: If you have any issues with attaching electronic files, please contact LAC PORR Acquisitions at: porr-rrop@bac-lac.gc.ca.

Step 3: Enter information about the final report.

Step 4: Enter your contact information.

Step 5: Enter any comments you may have. Enter “Final Methodological Report” if applicable.

Step 6: When ready, choose “Submit” to submit the files and the information you have entered.

A receipt will be emailed to you for inclusion in the project file.
Best practices for the deposit of POR narrative executive summaries and final reports to LAC:

✓ All files comprising a POR final report should be submitted together in one submission via the LAC POR website. Please do not submit separate files belonging to the same POR report independently.

✓ All components of a POR final report (including appendices) must be included within the report as one file. Only narrative executive summaries should be independent files.

✓ Avoid submitting multiple versions of the same final report with LAC. LAC may permit the deposit of revised versions upon request. Please do not send preliminary or draft versions, and ensure all “track changes” and “comments” have been removed from deposit copies.
APPENDIX 1


Acts
- **Financial Administration Act**: prohibits verbal-only public opinion research (POR) reporting.
- **Library and Archives of Canada Act**: requires departments to provide written reports to Library and Archives Canada (LAC) within six months of completion of data collection.

Regulations
- **Public Opinion Research Contract Regulations**: standardizes the form and content of contracted POR reports.

Policies
- **Common Services Policy**: identifies Public Works and Government Services Canada (PWGSC) as a mandatory common service organization for the coordination and contracting of POR.
- **Treasury Board’s Policy on Communications and Federal Identity**: outlines mandatory requirements to ensure coherent, cost-effective management of public opinion research throughout the government.
- **Contracting Policy**: requires departments to notify PWGSC when a POR project may require a contract.

Directive
- **Directive on the Management of Communications**: supports and facilitates implementation of the Policy on Communications and Federal Identity.

Standards for Public Opinion Research
- **Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys**: these standards are for online public opinion research surveys conducted for the Government of Canada.
- **Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys**: these standards are for telephone public opinion research surveys conducted for the Government of Canada.
- **Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research**: these standards are for custom qualitative public opinion research conducted for the Government of Canada.

Web Standards for Government of Canada
- **Standard on Web Accessibility**: this standard applies to government-wide Web pages and is meant to ensure a high level of accessibility of Web content.

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APPENDIX 2

Political Neutrality Certification

Political Neutrality Certification received from the supplier upon receipt of final reports.

The Project Authority should ensure that, for contracted public opinion research, the supplier's senior officer certifies upon delivery that the final deliverables comply with the political neutrality requirement. The following political neutrality certification is part of the contract:

<table>
<thead>
<tr>
<th>Political Neutrality Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>This certification is to be submitted with the final report submitted to the Project Authority.</td>
</tr>
<tr>
<td>I hereby certify as Senior Officer of ________________________________ that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research.</td>
</tr>
<tr>
<td>Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.</td>
</tr>
<tr>
<td>Signed ___________________________</td>
</tr>
</tbody>
</table>

French translations

Certificat de neutralité politique

Ce certificat doit être soumis avec le rapport final soumis à l'Autorité du projet. 

J'atteste, en tant que Haut Fonctionnaire de __________________________, que les résultats publiés ne contiennent aucune information sur les intentions électorales, les préférences partisanes, les appréciations des électeurs ou les notes de performance d'un parti politique ou de ses dirigeants.

Signé ___________________________
**APPENDIX 3**

**Cover Page Example**

- In the upper right-hand corner...
  - the POR registration number as assigned by PWGSC’s PORD;
  - the contract number as assigned by PWGSC’s Acquisitions Branch;
  - the contract award date; and
  - The delivery date (this is the date that the final report, accepted in its final version by the Project Authority, was sent by the research supplier to the Project Authority).

- POR Registration Number: POR XXX-XX
- PWGSC Contract Number: XXXX-XXXXX/XXX/XX
- Contract Award Date: September 1, 2012
- Delivery Date: June 1, 2013

- The title of the project (same as the title included in the POR plan).
- (TITLE)
  - (“Narrative Executive Summary”, “Final Report” or “Final Methodological Report”)
  -

- The name of the research supplier
- Prepared by:
  - (Name of Supplier)

- The name of the client department or agency
- Prepared for:
  - (Name of Department)

- The statement on the availability of the report in French if the submitted document is in English, and vice versa.
- Ce rapport est aussi disponible en français.

- For more information on this report, please email:
  - (Generic email address for the department)

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APPENDIX 4

Checklist for POR Narrative Executive Summary and Final Report

The following checklist summarizes elements that should be included in the narrative executive summary and final report. Please review your documents against this list prior to submitting them to LAC.

| Information that should appear on the cover page of the following documents: |
|---|---|---|
| | | Element |
| Narrative Executive Summary | Final report | |
| | | The POR registration number |
| | | The contract number |
| | | The contract award date |
| | | The delivery date |
| | | The title of the project same as the title included in the POR plan |
| | | The name of the research supplier |
| | | The name of the client department or agency |
| | | The statement "Ce rapport est aussi disponible en français sur demande" if the document is provided in English and the statement "This report is also available in English" if the document is provided in French |
| | | The departmental contact information (generic email address) |

| Information that should be included in the following documents: |
|---|---|---|
| | | Element |
| Narrative Executive Summary | Final report | |
| | | The purpose and objectives |
| | | The key findings, except where the contract involved solely field and data tabulation services, and an outline of how the results were used |
| | | The methodology used |
| | | A statement as to the extent to which the findings can be extrapolated to a broader audience |
| | | An outline of how the results were used, if possible, and if not, how the information is expected to be used |
| | | The total contract value |
| N/A | | The full results findings |
| N/A | | The appendices for quantitative research\(^2\), qualitative research\(^3\) and/or the final methodological report\(^4\) in all languages in which they were used and tested |
| N/A | | If applicable, notify LAC in the comments section for final methodological report |

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\(^2\) Appendices for quantitative research: a full set of tabulated data; sample size, sampling procedures, and dates of research fieldwork; if applicable, weighting procedures, confidence interval, and margin of error; if applicable, response rate and method of calculation; a discussion of the potential for non-response bias; the research instruments used and, if applicable, the test material in all languages in which they were used and tested; and all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.

\(^3\) Appendices for qualitative research: the research instruments used and, if applicable, the test material in all languages in which they were used and tested; all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.

\(^4\) These apply exclusively to fieldwork and data tabulation reports (such as advertising campaign evaluation tool (ACET) final methodological report): a full set of tabulated data; sample size, sampling procedures, and dates of research fieldwork; if applicable, weighting procedures, confidence interval, and the margin of error; if applicable, the response rate and method of calculation; a discussion of the potential for non-response bias; the research instruments used, and, if applicable, the test material in all languages in which they were used and tested; and all other information about the recruitment and execution of the fieldwork that would be needed to replicate the research initiative.
FOR MORE INFORMATION

Public Opinion Research Directorate (PORD)

For more specific questions, information, or services, please contact PORD by email at DGSIOpinionPublique.ISBPublicOpinion@pwgsc-tpsgc.gc.ca or by telephone at 613-995-9837.

Public Opinion Research Directorate
Public Works and Government Services Canada
350 Albert Street – 5th Floor
Ottawa, Ontario
K1A 0S5

Library and Archives Canada

Legal Deposit (Public Opinion Research Reports [PORR] Acquisitions)

For more information on the submission of public opinion research reports, please visit the Library and Archives Canada website at: http://www.porr-rrpop.gc.ca/. For more specific questions, information, or services, please contact PORR Acquisitions by email at porr-rrrop@bac-lac.gc.ca or by telephone at 819-953-1808.

Digital Resources – Legal Deposit and Web
Library and Archives Canada
395 Wellington Street
Ottawa, ON
K1A 0N4