



# Stakeholder Consultations in regard to the Role of the Parliamentary Budget Officer

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thinking forward

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## Executive Summary

Earnscliffe Strategies (Earnscliffe) is pleased to present this report to the Parliamentary Budget Officer (PBO) summarizing the results of qualitative research aimed at gaining a better understanding of stakeholders' awareness and perceptions of the role and mandate of the PBO.

Since its establishment in 2008, the PBO has provided independent analysis to Parliament on the state of Canada's finances, the government's spendings plans, trends in the Canadian economy and estimates of the costs of proposals within Parliament's jurisdiction.

A review of the PBO's enabling legislation (sections 79.1 to 79.5 of the Parliament of Canada Act) is required after five years of operations following the 2017 expansion of the PBO's mandate. As such, it appeared timely to get a clear understanding of how stakeholders value the Office of the Parliamentary Budget Officer (the "Office") and the work that it provides to Parliament, as well as positioning the Office to support parliamentarians as they hold the government to account.

This research was required to enable the PBO to evaluate its current business practices, its communication and outreach delivery, and identify potential improvements to support how the PBO interacts with stakeholders. The research will also support the legislative review, as noted above.

To meet the research objectives, Earnscliffe conducted a series of one-on-one interviews with Parliamentarians. Earnscliffe conducted a total of 32 interviews, including 19 interviews with MPs and 13 interviews with Senators. Twenty-two (22) interviews were conducted in English and 10 were conducted in French. The interviews were conducted both by video conference and in-person, depending on the interviewee's preference, between May 16 and June 22, 2022.

The key findings of the research are summarized below.

*It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number. As such, results are directional only.*

## Experience with the PBO

- Among Parliamentarians, there is widespread respect for the PBO. They value the impartial, independent perspective the PBO offers and place a great deal of trust in its work.
  - Working relationships with the PBO's staff are also quite positive.
- Parliamentarians are generally quite satisfied with the services the PBO offers and the quality of the work it conducts. They explained that the PBO's work supports them in numerous aspects of their own work (e.g., by helping them understand complex topics, they can more effectively and confidently scrutinize government policies).
  - The few who suggested areas for improvement commented generally that with more staff, capacity to do the work could be improved.
  - A couple of Parliamentarians felt that sometimes the PBO does not have access to all the information it needs to address a certain topic, either because departments are not forthcoming, or because there is simply a lack of research and information pertaining to some segments of the country (e.g., in the North).
- The majority of Parliamentarians could identify specific PBO reports that they had read and used to inform their work. While the PBO's analysis of the budget and fiscal updates were important to most, other topics of interest were wide ranging, and included Veterans' issues, pharmacare, carbon pricing, ship building, official bilingualism, defence spending and universal basic income.
  - Some had also worked with the PBO on costing for specific policy proposals and were satisfied with the experience.

## Familiarity with 2017 mandate changes

- Recall of the 2017 changes to the PBO's mandate was not strong.
- When prompted, some could remember the change to make the PBO an independent officer of Parliament and the costing of campaign platforms, but generally the changes were not top of mind.
- For those with any level of recall, the changes have not impacted their work with the PBO. Almost none opposed the changes, and the majority who recalled them were in favour.

## Activities while Parliament is not dissolved

*In order to explore attitudes towards the mandate changes in a more detailed manner, participants were provided with the following summary: As you may know, in 2017 the Parliament of Canada Act was amended to make the PBO an officer of Parliament, accountable to Parliament. It also set out several changes, including expanding the PBO's access to information beyond simply financial and economic data, and requiring that the PBO provide an annual work plan.*

- On balance, most Parliamentarians felt the 2017 non-election period changes were positive. As noted earlier, the change that the greatest number of Parliamentarians felt was very positive was the PBO's independence and accountability to Parliament. Many said that it is vital the PBO be non-partisan and truly independent.
- Many also felt that broadened access to information was an important change. In their view, it allows the PBO to consider relevant contextual information.
- A few Parliamentarians were concerned that the PBO may face political pressure to amend its workplan. They questioned whether the Speaker had the authority to make changes to the plan prior to tabling it.
  - One or two hoped the PBO had the latitude to add items to the plan over the course of the year, to respond to changing economic circumstances.

## Activities while Parliament is dissolved (election period)

*In order to explore attitudes towards the mandate changes in a more detailed manner, participants were provided with the following summary: Now, I would like to discuss the PBO's mandate during an election period, when Parliament is dissolved. As you may recall, in 2017 the PBO's mandate was expanded to include the costing of political parties' campaign proposals.*

- Parliamentarians' reactions to the 2017 changes regarding the PBO's mandate during election periods were more mixed. Those who were in favour of the PBO costing political parties' campaign proposals thought that it is helpful for Canadians to have credible information and important from an accountability perspective.
- Those who were not in favour of the PBO costing political parties' proposals had several concerns. Some were worried that this function politicizes the Office and poses significant reputational risk to the institution.
  - Others felt that while the idea may be good in theory, in practice they worried that the PBO does not have enough time during an election period to respond thoroughly to requests for costing.
- On balance, more felt the PBO should continue to carry out this function than believed it should stop doing it. However, even some who were supportive of this role suggested

improvements, such as lengthening the period of time ahead of an election that parties may provide campaign proposals for costing and releasing costing for all proposals submitted at the same time.

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I hereby certify as a representative of Earnscliffe Strategies that the final 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. 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.

Signed:

Date: July 8, 2022

A handwritten signature in black ink, appearing to read "Stephanie Constable".

Stephanie Constable  
Principal, Earnscliffe

## Introduction

Earnscliffe Strategies (Earnscliffe) is pleased to present this report to the Parliamentary Budget Officer (PBO) summarizing the results of qualitative research aimed at gaining a better understanding of stakeholders' awareness and perceptions of the role and mandate of the PBO.

Since its establishment in 2008, the PBO has provided independent analysis to Parliament on the state of Canada's finances, the government's spendings plans, trends in the Canadian economy and estimates of the costs of proposals within Parliament's jurisdiction.

A review of the PBO's enabling legislation (sections 79.1 to 79.5 of the Parliament of Canada Act) is required after five years of operations following the 2017 expansion of the PBO's mandate. As such, it appeared timely to get a clear understanding of how stakeholders value the Office of the Parliamentary Budget Officer (the "Office") and the work that it provides to Parliament, as well as positioning the Office to support parliamentarians as they hold the government to account.

This research was required to enable the PBO to evaluate its current business practices, its communication and outreach delivery, and identify potential improvements to support how the PBO interacts with stakeholders. The research will also support the legislative review, as noted above.

The specific objectives of the research were to:

- Gain a better understanding of current awareness and stakeholder perceptions about the role and mandate of the PBO
- Seek clarity on stakeholder expectations about the future role and mandate of the PBO
- Explore views and ways to optimize engagement and communication with stakeholders
- Improve knowledge of stakeholder needs and requirements
- Develop options for potential amendments to the Office's enabling legislation (sections 79.1 to 79.5 of the Parliament of Canada Act)

To meet the research objectives, Earnscliffe conducted a series of one-on-one interviews with Parliamentarians. Earnscliffe conducted a total of 32 interviews, including 19 interviews with MPs and 13 interviews with Senators. Twenty-two (22) interviews were conducted in English and 10 were conducted in French. The interviews were conducted both by video conference and in-person, depending on the interviewee's preference, between May 16 and June 22, 2022.

Appended to this report are the invitation letters and discussion guide.

*It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number.*



## Detailed Findings

This qualitative report is divided into five sections. The first outlines the experience respondents have had with PBO, including frequency, intensity, and types of interactions. The second covers Parliamentarians' familiarity with the 2017 changes to the mandate of the PBO. The third and fourth provide an overview of Parliamentarians' perceptions about the work PBO does when Parliament is not dissolved and when it is dissolved, as well as whether or how the mandate changes have changed perceptions about the PBO and its work. The fifth section covers additional commentary and suggestions for improvement.

### Experience with the PBO

Among Parliamentarians, the level of interaction and experience with the PBO varied widely. All were aware of specific reports published or activities undertaken by the PBO, but in terms of actual interaction with the Office, some described having had frequent and intensive interactions with the PBO while others have had virtually none. Some of this has to do with variance in tenure as some of the Parliamentarians interviewed have fewer years in their position, giving them less opportunity to have interacted. In some cases, there was mention that activity on a particular Committee resulted in additional interactions. For some, it is more one-on-one interaction they have had, often asking for clarification or for specific issues to be researched.

If any indicated any preference for a change in the level of interaction with, or information provided by, the PBO, it was always a preference for more.

Regardless of the level of interaction, there was widespread respect expressed for the PBO. Parliamentarians indicated valuing the impartial, independent perspective the PBO offers and place a great deal of trust in its work. Their working relationships with the PBO's staff were also described as quite positive. Staff were described as accessible, helpful, responsive, and cooperative.

Parliamentarians were broadly quite satisfied with the services the PBO offers and the quality of the work it conducts. The PBO's services and quality of work were characterized as thorough and helpful.

#### Exhibit 1 – Satisfaction with PBO services

<i>Q: In general, how satisfied are you with the services the PBO offers?</i>	<i># of responses</i>
Very satisfied	23
Somewhat satisfied	7
Neither satisfied nor dissatisfied	1
Somewhat dissatisfied	-
Very dissatisfied	-
No opinion/No response	1

#### Exhibit 2 – Satisfaction with the quality of the PBO's work

<i>Q: And, how satisfied are you in the quality of the work it conducts?</i>	<i># of responses</i>
Very satisfied	25
Somewhat satisfied	5
Neither satisfied nor dissatisfied	1
Somewhat dissatisfied	-
Very dissatisfied	-
No opinion/No response	1

There are many aspects of their work as Parliamentarians that the PBO's insight helps them carry out. For example, it helps Parliamentarians understand complex topics and how money is being allocated and spent, which in turn allows them to more confidently scrutinize government policies.

*“Requested to review policy issues several times particularly when I was in opposition. I think they're responsive, thorough, both in terms of understanding scope of my research and responding to my questions. Very non-partisan.” – Member of Parliament*

*“Cordial, important, a resource and validation (my office is a small think tank, we do our own research, sometimes we need to validate info or be directed towards where we can find that info). The PBO has incredible knowledge, rigorous, ethical, a very positive relationship.” -Senator*

*“I give them an A+. I don't know how they do all that work with just 40 staff. The reports are very well researched. On some of the reports the PBO will offer briefings to Parliamentarians and answer questions. I will sometimes contact the office and request one-on-one briefings and they will do that. I ask them questions and they always get back to you even if they can't answer the question. Accessible, helpful, professional, they know what they are doing.” -Senator*

*“The accountability function is the most valuable, e.g., TMX – government picture was rosy, but PBO analysis showed differently. It ensures we are well-equipped to hold the government accountable. Is the government living up to its promises and will there be a*

*benefit? PBO analysis makes sure there is greater scrutiny on that front.” -Member of Parliament*

*“I appreciate them, the information, and reports. I look for them (and) value that it is an independent look at a specific issue.” -Senator*

*“I would say for the independent (unbiased), objective, analysis/information, and quality of the reports. The information/data is verified. We can feel confident in the numbers/information. I would also say that the depth in which they go with their analysis/reports is remarkable. They're thorough and very well done.” -Senator*

The majority of Parliamentarians could identify specific PBO reports that they had read and used to inform their work. While the PBO’s analysis of the budget and fiscal updates were important to most, other topics of interest were wide ranging, and included Veterans’ issues, pharmacare, carbon pricing, ship building, official bilingualism, defence spending and universal basic income. Some had also worked with the PBO on costing for specific policy proposals and were satisfied with the experience. In most cases, the PBO was able to fulfill their request and in the few instances where a request could not be met, the Office clearly explained why.

## Familiarity with 2017 mandate changes

Recall of the 2017 changes to the PBO’s mandate was not strong. Two parliamentarians had clear recall of the changes with the majority expressing only vague recall. Another ten had no recall of the changes.

Exhibit 3 – Recall of 2017 mandate changes

<i>Q: How clearly do you recall the changes that were made to the PBO’s accountability structure and mandate in 2017?</i>	<i># of responses</i>
Clearly recall	2
Vaguely recall	20
Do not recall	10

On the whole, when prompted, some could remember the change to make the PBO an independent officer of Parliament and the costing of campaign platforms, but generally the changes were not top of mind. It is important to note that some of the lack of recall was explicitly described as due to Parliamentary tenures having begun only after the changes were made. However, even among those who were Parliamentarians at the time, very few had clear recall.

For those with any level of recall, the changes have not impacted their work with the PBO.

Almost none opposed the changes, and the majority who recalled them were in favour.

#### Exhibit 4 – Support/Opposition to mandate changes

<i>Q: Would you say you were generally in favour, opposed or have no real feeling one way or the other to these changes?</i>	<i># of responses</i>
In favour	8
Have no real feeling one way or the other	6
Opposed	1
Do not recall/No opinion/No response	17

Those supportive of the changes mostly referenced the importance of the PBO being a “stand-alone” officer of Parliament, but some did mention the campaign platform costing function.

*“As I am only new in this role, I do not know much about the changes.” -Senator*

*“I remember it [the mandate changes] happening but it has not impacted my work with them. It put them on a firmer footing - not under Library of Parliament anymore. I thought their independence was sufficient under the Library of Parliament, but formalizing independence was important.” -Member of Parliament*

*“I believe they were trying to create an independent body (from Library of Parliament, House of Commons). And, in this regard, they execute very well. To have honest (unbiased), credible information is critical.” -Member of Parliament*

*“It has kept the parties more honest, kept them on their toes, a valuable civic function for voters to refer to. Of course, parties can still be ambiguous and ‘game the system’ but in general, it’s become a lot harder to make promises in a campaign in a fiscally irresponsible way.” -Senator*

## Activities while Parliament is not dissolved

*In order to explore attitudes towards the mandate changes in a more detailed manner, participants were provided with the following summary: As you may know, in 2017 the Parliament of Canada Act was amended to make the PBO an officer of Parliament, accountable to Parliament. It also set out several changes, including expanding the PBO’s access to information beyond simply financial and economic data, and requiring that the PBO provide an annual work plan.*

Provided with an explanation of the mandate changes outside an election period, on balance, most Parliamentarians felt the changes were positive.

# Exhibit 5 – Overall reaction to mandate changes when Parliament is not dissolved

Q: In your view, have these changes to the PBO's mandate been very positive, somewhat positive, neither positive nor negative, somewhat negative, or very negative?	# of responses
Very positive	9
Somewhat positive	15
Neither positive nor negative	5
Somewhat negative	-
Very negative	-
Don't know/No response	3

As noted earlier, the change that the greatest number of Parliamentarians felt was very positive was the PBO's independence and accountability to Parliament. Many said that it is vital the PBO be non-partisan and truly independent. Many also felt that broadened access to information was an important change. In their view, it allows the PBO to consider relevant contextual information. There was no sense expressed that the work of the PBO has deteriorated or gotten worse in any way as a result of the mandate changes.

*"[My impression is] positive, particularly the possibility to go beyond financial or fiscal information. You need the policy context that goes with the numbers. Without it, it's hard to make judgement calls." -Member of Parliament*

*"There's been an evolution in the role of the PBO. The changes have created more respect for the office. Before the changes were made, there was controversy. Does the PBO go beyond the responsibilities set out for it? Government of the day had some discomfort with that. Discomfort isn't gone. But by emphasizing the independence and accountability to Parliament, that is a positive evolution." -Senator*

*"Canadians expect transparency and accountability. Anything that will enhance that is a good thing. PBO has a huge role in that, whether what they discover is good or bad (is a very important role in holding government to account)." -Member of Parliament*

*"There are some positives. PBO needs to be accountable to Parliament, not the Government of Canada, so I like that." -Member of Parliament*

*"I wish I paid more attention to the annual work plans, but I haven't. I like the idea that they are accountable to and an Officer of Parliament. Not sure I have a strong view about the access to additional information. It depends on whether it improves the quality of the work provided to Parliamentarians." -Senator*

*"Knew about the officer of Parliament one. Didn't know about the annual plan but that sounds like good hygiene." -Member of Parliament*

*"Don't know that the changes impacted or enabled my requested study. It certainly did not get in the way of the work I wanted done." -Senator*

*"No, I don't think (the change had any impact on interactions with PBO). Except to the extent they are putting out more information and I go to their website often to see what they have. So the fact there is more volume of information has been more helpful." -Member of Parliament*

*"The changes have not influenced how I use the information. Again, I didn't notice a difference. I didn't really understand the former mandate and what changed." -Member of Parliament*

*"I couldn't say that the changes had an influence on the service but the changes did mean that I used the service and put more stock/credibility in the responses I received from the PBO." -Member of Parliament*

One caveat to the general approval of the changes was a concern noted by a few Parliamentarians that the PBO may face political pressure to amend its workplan.

*"I'm concerned with an aspect of the work plan. The Speaker = Government. Is this plan alerting them to what the PBO will investigate? I'm a little concerned that we might lock them into a plan. They need to be nimble and flexible." -Member of Parliament*

One or two, who weren't familiar with the details of the workplan, said they hoped the PBO had the latitude to add items to the plan over the course of the year, to respond to changing economic circumstances. In their view, the PBO must be flexible and nimble.

Parliamentarians also questioned whether the Speaker had the authority to make changes to the plan prior to tabling it:

*"I don't agree with the annual work plan being required. Having to give that to the two Speakers is absolutely terrible and infringes on the PBO's independence. Why should he have to lay out a plan for approval? He has to consult with the Speakers and then table his work plan. I don't see the need for that." -Member of Parliament*

*"I looked at the clauses in the Parliament of Canada Act and I have some questions about the role of the Speakers. To what extent do the Speakers have a say? Do the Speakers know what Members and Senators need to have done in the upcoming year? All of this is new and I wonder how that whole mechanism works and whether it has been successful. I can't recall the Speaker reaching out to Senators asking what the PBO should focus on this year." -Senator*

*"I would be concerned if the Speaker could amend the work plan." -Member of Parliament*

## Activities while Parliament is dissolved (election period)

*In order to explore attitudes towards the mandate changes in a more detailed manner, participants were provided with the following summary: Now, I would like to discuss the PBO's mandate during an election period, when Parliament is dissolved. As you may recall, in 2017 the PBO's mandate was expanded to include the costing of political parties' campaign proposals.*

Parliamentarians' reaction to the 2017 changes regarding the PBO's mandate during election periods was more mixed.

Exhibit 6 – Overall reaction to mandate changes when Parliament is dissolved

<i>Q: In your view, has this change to the PBO's mandate been very positive, somewhat positive, neither positive nor negative, somewhat negative, or very negative?</i>	# of responses
Very positive	14
Somewhat positive	9
Neither positive nor negative	6
Somewhat negative	1
Very negative	2

Those who were in favour of the addition of political parties' campaign proposals thought that it is helpful for Canadians to have credible information that will allow them to know more about how much these proposals will cost. In their view, the PBO's costing provides another layer of accountability for political parties.

*"For Canadians, we must know the cost of things such as: how money is being spent?; what the revenue plan is for the country?; what the expenditure plans look like?; what are the interest rates?; where are inflation rates at? Those are all important drivers that should influence people's decisions when they go to the polls." -Member of Parliament*

Those who were not in favour of the PBO costing political parties' platforms had several concerns. Some were worried that this function politicizes the Office and poses significant reputational risk to the institution.

Others felt that while the idea may be a good one in theory, in practice they worried that the PBO does not have enough time during an election period to respond thoroughly to requests for costing, particularly if the election occurs outside the fixed dates (meaning the Office does not have advance notice to prepare, and increase staffing if needed) or if parties fail to provide all the relevant information in a timely manner.

*"The idea itself is good - external body looking at what parties are saying and informing the public, which is good. Offers voters a certain reassurance. I do think that the calendar of electoral period, the writ is not long enough to allow the PBO to do a proper job. If*



*parties want the PBO to examine platforms, there needs to be a pre-writ deadline. I know their staff is not limit-less.” -Member of Parliament*

*“Costing the platforms - it is their obligation, but do they have the resources to do it? Platforms are not ready to go. It is asking a lot of the office in a limited amount of time. Maybe there should be a pre-election deadline, but don't really know. Not doing the PBO any favours now.” -Member of Parliament*

*“It imposes such a difficult obligation on the PBO in some ways. They necessarily have to provide a cursory analysis. Greater transparency is good. Good to have an assessment for big things like dental, housing, but they will be way too hamstrung with the short timelines during an election period. I have some concerns.” -Member of Parliament*

*“It does lend itself to controversy, particularly when there are sharp differences of opinion, but this is a communications exercise for PBO. Going into any deeper analytical level during an election could get into partisanship.” -Senator*

On balance, more felt the PBO should continue to carry out this function than believed it should stop doing it. However, even some who were supportive of this role suggested improvements, such as lengthening the period of time ahead of an election that parties may provide campaign proposals for costing, and releasing costing for all proposals submitted at the same time.

*“Yes (it should be continued). It's probably the only function that Canadians know they do.” -Member of Parliament*

*“Absolutely (it should be continued). When you understand all the platforms when it comes to budgets, that's the continuum you want to know (as a voter).” -Member of Parliament*

## Suggestions, Recommendations and Additional Comments

At various points of the interviews, Parliamentarians offered suggestions for the PBO to consider or recommendations for improvements. They arose from a variety of different contexts, but often were not directly related to any of the specific issues addressed above. This section gathers the various elements together in order to provide PBO with a summary that might help inform decisions about how to improve the level of service PBO provides to Parliamentarians or what other changes might be worthy of consideration.

Before reviewing the specific suggestions, it is worth reiterating that Parliamentarians are already quite satisfied with the work of the PBO and suggestions were about enabling deeper or more varied analysis, expanding PBO capabilities in order to produce even more, or in measures that may protect the highly valued integrity of the PBO.



- Some Parliamentarians were concerned about the sustainability of the PBO, suggesting that by providing a more stable or increased budget, or possibly adding more staff, the capacity of the PBO could be protected and improved or at least, better supported during peak periods.

*“Good for parties to have analysis from really smart people. Do they have the resources though?” -Member of Parliament*

*“The budget is important. Their ongoing budget is important. They should also have more capacity to force departments to provide information as requested. They secure their independence but they also have to secure the financial independence.” -Member of Parliament*

*“The approval of the PBO's budget. It seems like it got to be approved by the Speakers. I'd like to talk to the Auditor General and see how her budget is approved and it should be the same way as for the AG. Section 79.21 is also problematic. The Minister will instruct his/her Deputy to make whatever determination they feel is necessary for enabling the PBO to do their analysis. Review the legislation and make changes to remove anything that controls the Office.” -Senator*

- A number of Parliamentarians felt that sometimes the PBO does not have access to all the information it needs to address a certain topic, either because departments are not forthcoming, or because there is simply a lack of research and information pertaining to some segments of the country (e.g., in the North).

*“I am very satisfied in his team. The only problem is access to information. I have heard his complaints that they don't always receive the information they need from government departments, or it is not timely. It's a handicap for his role. If information is withheld (or not made available), the quality of the report/analysis will suffer (will be incomplete).” -Member of Parliament*

*“They need a stronger authority to capture information from the department.” -Member of Parliament*

*“I look at them with a critical/objective eye – are there areas that have been missed? The North is missing - statistically a challenge. Yukon doesn't submit stats to CIHI. Info doesn't always help me. Would like to see them provide more of a picture of northern Canada. An improvement would be a greater picture of Canada beyond where pop is concentrated.” - Senator*

*“As a parliamentary institution, I hear of the PBO often but it's the one I interact with the least. Even during my training as a new parliamentarian, we spoke of many institutions, but we were never introduced to the PBO even.” -Member of Parliament*

- On multiple occasions Parliamentarians suggested ensuring the PBO has the ability to handle the intense effort required for the costing of parties' platforms.

*"With fixed election dates, there could be a period in which political parties could get costing completed (under strict confidentiality). For example, on an ongoing proactive basis, as a parliamentarian, let's say we're looking at announcing a policy that's contrary/alternative to current government policy, that the PBO could be available for costing on that. Never thought to do that and I'm not sure it is possible now, but that could be interesting." -Member of Parliament*

- There were some suggestions relating to PBO communications and/or timing of the release of the costing of parties' platforms.

*"Re-think communication. Make it more accessible. They don't do a bad job. A lot of this is easily explainable." -Member of Parliament*

*"If they keep doing this, (the PBO) should release costings at the same time and date, after the leaders' debate, so their costing cannot be used during the debate. The costing is not useful for the public - no one is reading it." -Member of Parliament*

*"Information sharing is a challenge. Be mindful of how this information is shared - should be in the most fulsome manner. Canadians are not reading a daily newspaper. PBO has to be mindful of how information will be perceived and shared in dissemination of reports." - Senator*

*"Understanding the PBO's focus/strategy at the beginning of every session would be beneficial, even if they produce a clip (i.e., 'here are our goals and reports we are working on'. That would be helpful. The PBO is proactive in communicating with staff when certain reports are coming out and on which date and that's helpful. The offer of individual one-on-one briefings is also helpful. I also really like the structure and quality of their reports. My only suggestion would be more strategic alignment with the Library of Parliament because I like how the Library of Parliament takes the PBO's reports and breaks them down in more layman terms. More alignment with them and I know in the mandate it says their work should not be repetitive but more alignment so maybe PBO does the video which is more prescriptive and then Library breaks it down so it's easier to understand." - Member of Parliament*

- There were suggestions offered about having the PBO appear at Committees on a more regular basis, or with more Committees.

*"I don't know what the mandate is in terms of its position on committees, but I always thought if the PBO could be available to multiple or more committees would be really helpful. I sit on a Committee of public accounts so we have to talk about how things are*

*spent retroactively. I've always been fascinated to know why PBO doesn't have a standing appointment at some of these committees to give their advice as to the cost/benefit analysis of programs. I think this could be relevant to public accounts or treasury board or some of the other review boards.” -Member of Parliament*

*“I think a question that stakeholders need to be asking is where is the value greatest from PBO? I think the backwards-looking, evaluation of performance, effectiveness of spending, efficiency of the delivery of the program -- I think there's a lot more that the PBO could do there that would be valuable. There may be more but that is one that I would be in favour of and it may be a capacity issue. Even reviewing the budget now is a much more complex document to review than in the past, so their role on that is vital, but following up on the back end would be extremely helpful. Significantly valuable. Plus, there is actual data from experience to analyse. I would rank that as a very high value activity that the PBO provides. The other is more about a reporting function. The Bank of Canada Act lays out a predetermined number of times the Governor has to appear before Committee. There should be the same thing laid out for PBO for Finance Committee and not with other witnesses. More one-to-one between PBO and the Committee.” -Member of Parliament*

- One theme for a few suggestions related to communicating to help Parliamentarians better understand how to direct or work with the PBO or to provide more about caveats or alternative approaches to the PBO analysis that may generate different results.

*“The only thing I would add would be around training for new MPs. Parliament does a good job training new parliamentarians on procedures, processes, and other parliamentary offices but information and training related to this office (PBO) is very low. I think, even just spending 15 minutes talking about the PBO office or even meeting them the first week would have been exceptionally more helpful.” -Member of Parliament*

*“(Is there an) additional check or balance in PBO reporting – a secondary review? (We should be) cautious about adding another layer, but how do Canadians know there have been a variety of views around the table? Is there room for a dissenting opinion? (We) need a variety of voices and skill sets.” -Senator*

*“I think they could be more collaborative with members to provide proactive advice or a rubric on their website on how to put together scopes.” -Member of Parliament*

*“The work of the PBO is laden with a lot of assumptions which most Parliamentarians don't pay a lot of attention to. The ‘problem’ with the PBO is their information is used as a battering ram for whatever agenda somebody has, but it really doesn't trigger any discussion on the assumptions made. Like the debate around sustainability of the federal deficit. First of all, how do you define ‘sustainable’? The answer the PBO gives will be a*

*view that one can either agree with or disagree with. There's a tendency to give the numbers as though they are not value-laden." -Member of Parliament*

- One Senator offered the view that dissolution of Parliament unfairly affects the work that PBO is doing on behalf of the Senate and possibly a change could be made to enable that work to continue during a period of dissolution.

*"The only thing as I was reading the act. 79.2(5) about his role during the dissolution of Parliament, all the work he is currently doing dissolves which is unfair to Senators (who are not in an election). If a Senator is looking into an issue during an election, they are still working and for him to stop his work for them is a little bit unfair. There should be a distinction between the Senate and the House. I think it was in 2021, a Senator made a request to PBO about the cost savings of having hybrid meetings. When the writ drops, that Senator still wants to know the results of that analysis and have it as soon as Parliament returns." -Senator*

- Finally, as has been stated above, Parliamentarians universally cherish the independence of the PBO and seek to protect that, and as iterated, there were some comments about the need to avoid any perception of partisanship or undesirable impact on electoral outcomes during periods of dissolution. But in addition to that type of caution, one Parliamentarian cautioned against trying to play a more authoritative role than it currently does and expressing a desire to ensure the PBO remains purely a source of empirical, neutral information.

*"Continue to facilitate flow of info to parliamentarians. Don't be a Sheriff in town."*

## Conclusions

The interviews conducted in this study clearly demonstrate that Parliamentarians hold PBO in very high regard. The main drivers of this appreciation are the quality of work, the level of analysis undertaken, the expertise, the professionalism, the impartiality, the volume of information produced and the fact that the information produced is extremely helpful to Parliamentarians.

Parliamentarians often went to some lengths to describe their interest in leveraging the PBO to even greater degree, as well as to protect the mandate and integrity of the office.

What criticisms shared were universally constructive, with a variety of suggestions and recommendations offered, almost always to further enable or strengthen the PBO.

In terms of the 2017 changes to the mandate, familiarity with the changes was neither broad nor deep. However, this clearly does not detract from the impressions of the PBO nor has it adversely affected how the PBO is used.

There is some indication that communications about the mandate, particularly to newer Parliamentarians, can only be beneficial, but there is no evidence to suggest that will further increase the already high degree of satisfaction identified.

## Appendix A – Interview Invitation Letters

### PBO Letter

April xx, 2022

[NAME], M.P.  
[ADDRESS]

Dear XX,

This year marks the 5<sup>th</sup> anniversary of the new mandates of the Parliamentary Budget Officer (PBO) which were defined through changes to the *Parliament of Canada Act* and the PBO is seeking your input on this legislation.

Section 79.501 of the *Parliament of Canada Act* requires a committee of the Senate, of the House of Commons or of both Houses of Parliament to undertake a review of sections 79.01 to 79.5 of the *Act*.

These sections of the *Act* established the PBO as an independent officer of Parliament, defined the relationship between the PBO and the Library of Parliament, established the preparation of the annual work plan and other administrative processes for the office, and defined the PBO's mandate both during periods when Parliament is not dissolved and when Parliament is dissolved.

In preparation for this review, the PBO has hired Earnscliffe Strategies to consult with current and former Parliamentarians about their impressions of sections 79.01 to 79.5 of the *Parliament of Canada Act*. These consultations will allow current and former Parliamentarians to share feedback on the PBO's legislated mandates confidentially. The information that is gathered by the consultants will be anonymized and will be provided to the PBO in the form of a consultation report that will inform the legislated review.

Dorie Milito of Earnscliffe ([dorie@earnsccliffe.ca](mailto:dorie@earnsccliffe.ca)) will be reaching out to you directly to schedule a discussion. Alternatively, you can reach out to Earnscliffe directly to convey your interest in participating. We appreciate your participation in this consultation process and value your insights.

In the interim, should you require any additional information please do not hesitate to contact me or a member of my staff.

Sincerely,

Yves Giroux  
Parliamentary Budget Officer

## Earnscliffe Letter

May XX, 2022

[FIRST NAME] [LAST NAME] [TITLE]  
[ADDRESS]

Dear [INSERT SALUTATION] [LAST NAME],

I am writing to follow up on a letter sent to you by Parliamentary Budget Officer (PBO) Yves Giroux, requesting your participation in a study regarding the PBO's legislated mandates. Our team at Earnscliffe Strategies is undertaking this project on behalf of the PBO.

Over the course of the next few weeks, we will be conducting one-on-one interviews with Parliamentarians to gather feedback on the PBO's mandate. If you agree to participate, the interview would be conducted in person, over the phone or by video conference, based on your preference. The interview would take approximately 30 minutes of your time on a date and at a set time convenient to you and would be conducted in your preferred official language.

As is customary with this type of research, results will be anonymous and reported on an aggregate basis only; no individuals will be identified in any reporting for this research. With your permission, the interview would be recorded to help our team compile our final report to the PBO.

Within Earnscliffe, only the opinion research team assigned to this project will have access to any data, recordings and reports produced throughout the course of this project. Earnscliffe will report on the research to the PBO but will not share the data or findings with any others in any other way.

Thank you very much for considering this request. Your input is key to our research, and we hope you'll take time to share your thoughts with us.

Sincerely,



Stephanie Constable  
Principal

## Appendix B – Interview Guide

Name:

Title:

Interview location:

Date/Time:

Interviewer:

Thank you for agreeing to take part in this research project. As mentioned when we invited you to participate in this interview, our research team at Earnsccliffe Strategies is conducting these interviews on behalf of the Parliamentary Budget Officer (PBO). The purpose of the interview is to gather feedback on Parliament's 2017 legislative amendments to the PBO's mandate, better understand perceptions of the PBO and improve knowledge of stakeholder needs and requirements.

As a reminder:

- There are no right or wrong answers, so please speak as openly and frankly about opinions.
- Please be assured that all of your responses will be kept confidential. Your input will be combined with responses from other study participants and compiled into a report that will provide feedback to the PBO.
- With your approval, we would like to record the interview for reporting purposes as it is difficult to take notes and lead the conversation at the same time.
  - Do you approve of us recording the interview?
- The interview will last approximately 30 minutes.

We really appreciate you taking the time to talk with us today and share your experiences. Your views and opinions are extremely important. Feel free to stop me at any time for a break or if you have any questions at all.

### Warm-up and context setting

**10 min    10 min**

To begin, we would like to briefly discuss if and how you interact with the PBO.

- How would you describe your current relationship with the PBO?
- Do you make use of the PBO's services and work?
  - Which ones? Probe for: analysis of budget, fiscal updates, fiscal sustainability report, estimates, reports relating to Canada's finances/economy, committee requests, Parliamentarians' requests to cost/analyse proposals.
  - Probe: How often? For what purpose(s)?



- How clearly do you recall the changes that were made to the PBO's accountability structure and mandate in 2017?
  - As far as you can recall, what were those changes?
  - And what did you make/think of the changes? Why?
  - Would you say you were generally in favour, opposed or have no real feeling one way or the other to these changes? Why?

## Activities while Parliament is not dissolved

10 min 20 min

Let's first discuss the PBO's activities while Parliament is not dissolved, in other words, outside of an election period.

As you may know, in 2017 the Parliament of Canada Act was amended to make the PBO an officer of Parliament, accountable to Parliament. It also set out several changes, including expanding the PBO's access to information beyond simply financial and economic data, and requiring that the PBO provide an annual work plan.

- In your view, have these changes to the PBO's mandate been very positive, somewhat positive, neither positive nor negative, somewhat negative, or very negative? Why?
  - Have they impacted how you use PBO services or information? How so? Why?
- Do you think these legislative changes were appropriate to meet the needs of parliamentarians?
- In general, how satisfied are you with the services the PBO offers (very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied, very dissatisfied)?
  - Probe: Why do you provide that rating?
- And, how satisfied are you in the quality of the work it conducts (very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied, very dissatisfied)?
  - Probe: Why do you provide that rating?
- In your role, what are the most valuable services or reports the PBO provides? Why?

## Activities while Parliament is dissolved

5 min 25 min

Now, I would like to discuss the PBO's mandate during an election period, when Parliament is dissolved. As you may recall, in 2017 the PBO's mandate was expanded to include the costing of political parties' campaign proposals.

- In your view, has this change to the PBO's mandate been very positive, somewhat positive, neither positive nor negative, somewhat negative, or very negative? Why?
- Moving forward, should this function be a part of the PBO's mandate? Why/why not?
- Moving forward, how do you feel the PBO should carry out this function?

## Conclusion

5 min 30 min

- Apart from what we have already discussed, would you recommend any additional changes to the PBO's mandate? Why do you say that?
- Before we conclude, do you have any final thoughts or comments to pass along? Is there anything you were hoping we would discuss that I didn't cover?
- This concludes what we needed to cover. We really appreciate you taking the time to share your views. Your input is very important.