



August 20, 2020

David McKie
CBC News
181 Queen Street
Ottawa ON K1P 1K9

Our file
A-2018-102552

Dear David McKie:

This letter is in reply to your request for information pursuant to the *Access to Information Act* (the Act) for:

"I would like records regarding Indigenous communities and their use of the Canada Child Benefit, (include emails sent to or prepared by the Assistant Commissioner, notes and other documents that include discussion on the matter, only final draft required). Also include data or statistics on the total amounts directed to this specific group.

Timeframe is from September 6, 2017 to June 12, 2018.

Please exclude material considered to be matters of cabinet confidence, or subject to third-party consultations (this includes other government departments and agencies)."

We have enclosed a copy of the requested information. When you review the documents, you will note some shaded areas where the information has been removed in accordance with subsections 24(1) and 68(a), and paragraphs 16(2)(c) and 21(1)(b) of the Act.

Officials from the Strategy and Integration Branch have advised that:

The deck "***Measuring tax-filing amongst Indigenous peoples: update Key findings from the 2015 tax year***" provides an overview of the project's key findings. Minor errors were noted in the documents, and we are providing the corrected version below:

- Slide 4: There are 822 populated reserves in Canada, not 882.
- Slides 8 and 9: The map titles indicate these are linkage rates for individuals aged 19+; however, the results reflected are for individuals aged 15+.

In addition, please note the following:

- Slide 13: The numbers on this slide are correct. However, they differ from the numbers provided in the briefing note for the following reasons:
- The briefing note provides the linkage rate for families with children under the age of 18, within a certain income threshold (less than \$150,000).

.../2

- 2 -

• Slide 13 in the accompanying deck provides the linkage rate for all families with children under the age of 18, regardless of household income. The linkage rate for on-reserve families remains the same, whether an income cut-off is applied or not (79%). However, for families in Canada, the number for all families with children under the age of 18, as outlined on this slide, is 91%. When applying an income threshold, as in the briefing note, the number is 92%. Similarly, for families in Inuit Nunangat, the number increases from 85% to 86% for families when this income threshold is applied.

The report "Serving You Better – Report on the Canada Revenue Agency's consultations with northern residents" on pages 000179-000188 is publicly available and can be found on the Government of Canada site: <https://www.canada.ca/content/dam/themes/taxes/campaign/northern-res/servingnrpdf-e.pdf>.

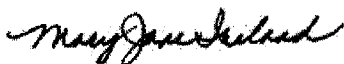
The report "Benefits and Credits – Information for Indigenous Peoples" on pages 000472-000502 is publicly available and can be found on the Government of Canada site: <https://www.canada.ca/content/dam/cra-arc/camp-promo/information-indigenous-people.pdf>.

Please note that you are entitled to complain to the Information Commissioner about the processing of your request within 60 days of receiving this notice. If you use this right, please send your notice of complaint to:

Office of the Information Commissioner of Canada
30 Victoria Street
Gatineau QC K1A 1H3

I trust the information provided will be of assistance to you. If you have any questions or require more information about the processing of this request, please contact Sabrina McDonald by calling 343-571-7443 or by email at Sabrina.mcdonald@cra-arc.gc.ca.

Sincerely,



Mary Jane Ireland
Manager
Access to Information
and Privacy Directorate

Enclosure

Vachonwood, Nicole

From: Chasse, Valerie
Sent: February 22, 2018 03:51 PM
To: Patel, Shiraz
Cc: Hoogsteen, Nicole; Chasse, Valerie; Harding, Chantal
Subject: BINDER: Ministerial Briefing - March 1 - Indigenous Service Update
Attachments: MinCo-26February2018-Indigenous-V6_EN.PPTX; CRA Major Project Investments.pdf; MIN_Briefing_DTC_Final_Feb_7.pptx; DTC QA Exercise step 1 final.docx; MinCO - 2018-02-26_English.docx

More docs for binder tomorrow

From: Furlong-Lachapelle, Lora
Sent: February-22-18 3:31 PM
To: Harding, Chantal <Chantal.Harding@cra-arc.gc.ca>; Chasse, Valerie <Valerie.Chasse@cra-arc.gc.ca>; Hoogsteen, Nicole <Nicole.Hoogsteen@cra-arc.gc.ca>
Subject: FW: Ministerial Briefing - March 1 - Indigenous Service Update

From: Issues-SIB / Enjeux-DGSI (CRA/ARC)
Sent: February-22-18 3:25 PM
To: Gatto, Angelo <Angelo.Gatto@cra-arc.gc.ca>
Cc: CRA.F ABSB_ISSUES / DGCPES_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPES_ENJEUX_ARC@cra-arc.gc.ca>; Jokela, Heidi <Heidi.Jokela@cra-arc.gc.ca>; Wiener, Heidi <Heidi.Wiener@cra-arc.gc.ca>; Issues-SIB / Enjeux-DGSI (CRA/ARC) <ISSUESSIBG@cra-arc.gc.ca>
Subject: RE: Ministerial Briefing - March 1 - Indigenous Service Update

Angelo,

Here the revised deck in English. Approved by acting AC.

Thank you,

Alisa

From: Gatto, Angelo
Sent: February 22, 2018 3:07 PM
To: Niakhai, Alisa <Alisa.Niakhai@cra-arc.gc.ca>
Cc: CRA.F ABSB_ISSUES / DGCPES_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPES_ENJEUX_ARC@cra-arc.gc.ca>; Jokela, Heidi <Heidi.Jokela@cra-arc.gc.ca>; Wiener, Heidi <Heidi.Wiener@cra-arc.gc.ca>; Issues-SIB / Enjeux-DGSI (CRA/ARC) <ISSUESSIBG@cra-arc.gc.ca>
Subject: RE: Ministerial Briefing - March 1 - Indigenous Service Update
Importance: High

Hi Alisa,

Can I get an update on this deck? When can we expect to have French and English back with CO?

Thanks!

Angelo Gatto

From: Niakhai, Alisa

Sent: February 20, 2018 11:19 AM

To: Gatto, Angelo <Angelo.Gatto@cra-arc.gc.ca>

Cc: CRA.F ABSB_ISSUES / DGCPs_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPs_ENJEUX_ARC@cra-arc.gc.ca>; Jokela, Heidi <Heidi.Jokela@cra-arc.gc.ca>; Wiener, Heidi <Heidi.Wiener@cra-arc.gc.ca>; Issues-SIB / Enjeux-DGSI (CRA/ARC) <ISSUESSIBG@cra-arc.gc.ca>

Subject: Ministerial Briefing - March 1 - Indigenous Service Update

Angelo,

Here's the deck.

Thank you,

Alisa Niakhai

Acting Issues Manager, ACO/BSC

Strategy and Integration Branch / Direction générale de la stratégie et de l'intégration

Issues Manager, DGO/BDG

Intelligence, Statistics and Data Directorate / Direction de l'intelligence d'affaires et des statistiques

Strategy and Integration Branch / Direction générale de la stratégie et de l'intégration

Phone / Téléphone: (613) 960 7887

Cell: (613) 404 3164



Indigenous Peoples' access to benefits and credits through the tax system

Ministerial Briefing

February 26, 2018

Purpose

- To provide an overview of the challenges in Indigenous Peoples' access to benefits and credits available through the tax system.
- To review steps taken to date by the CRA and partners.
- To identify next steps.
- To situate this ongoing work within the upcoming CRA Indigenous Strategy.

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Challenges in Benefit Access

- **Filing a tax return is the key** to unlocking benefits and credits administered through the tax system, as well as income-tested programs (e.g., Old Age Security).
- In 2014, at the request of Aboriginal Affairs and Northern Development Canada*, the CRA produced a preliminary estimate of on-reserve tax-filing rates, suggesting rates as low as 50%. However, initial data sources were poor.
- Reasons for low Indigenous filing were not clear, but seemed likely to include a mix of:
 - Awareness;
 - Perceived or real complexity;
 - Community remoteness (e.g., telecommunications access);
 - Lack of local capacity; and,
 - Historical resistance to participation in the tax system.
- Poor data quality and lack of understanding of root causes hindered efforts to improve benefit uptake in the Indigenous population.

Steps taken to data to promote Indigenous access to benefits

Three-pronged approach:



Research & data

Better understanding filing rates issues

Public Opinion Research

- In 2016-2017, we launched two public opinion research studies (one with on-reserve populations, and one with vulnerable populations, including urban Indigenous peoples), to improve our understanding of barriers to tax-filing.
- Key findings included:
 - Awareness of benefits and credits is uneven;
 - Complexity of tax filing and costs are seen as a significant barrier;
 - Individuals prefer to use a tax preparer over self-filing.

Research & data

Measuring the size of the issue

Linkage rate project

- As a proxy we use the rate at which individuals who participated in the Census (2016) can be linked to a tax return for the nearest tax year (2015). Key findings include:
 - **There is a gap** between the linkage rates of Indigenous and non-Indigenous individuals: 83% compared to 91%. However, this gap is significantly smaller than previously estimated.
 - **The gap is largest among the on-reserve population:**
 - Indigenous peoples on-reserve: 75%
 - Indigenous peoples off-reserve: 85%
 - Indigenous peoples in Inuit Nunangat*: 85%
 - **The gap is smallest among families** which may be eligible for the CCB.
 - Families across Canada: 92%
 - Families on-reserve: 79%
 - Families in Inuit Nunangat: 86%
 - **The rates vary widely across Indigenous communities**, from 33% to 97%.

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Research & data

Measuring the size of the issue (continued)

- These results are also from 2015 – a year before the launch of the CCB, and prior to the significant joint efforts of CRA, ESDC, and Service Canada, to promote benefit uptake in Indigenous communities.
- **The results to date establish a baseline** to measure our impact in future years and monitor the situation.
- They also help us understand the scope of the issue and better target our various activities.
- **Statistics Canada is now exploring more detailed analysis of the CCB administrative file**, to further refine analysis of CCB-uptake on-reserve.

Partnerships

Fostering collaboration

- Continuous, active collaboration with key federal partners:
 - **Statistics Canada (Statscan)** – to help assess Indigenous filing rate
 - **Employment and Social Development Canada (ESDC)** – CCB “owner”
 - **Service Canada (SC)** – outreach and information dissemination partner
 - **Department of Indigenous Services Canada (DISC)** – regionally active in joint outreach visits

Developing a common vision

- In September 2017, the CRA launched an **inter-departmental working group** to review and apply the findings of research projects undertaken to-date, including: the two public opinion research studies, and the Statscan-led linkage rates project to establish a baseline for measuring Indigenous tax-filing.
- Together, officials have reviewed the findings from these projects and identified **five key themes**: knowledge of benefits and credits; awareness of and access to support; perceptions of complexity of the filing system; interfacing with the government; and, addressing unique challenges and community capacity.
- The working group is in the process of **identifying interdepartmental initiatives** to address specific issues identified through this process.

Engaging Indigenous Organizations

- In the coming weeks, the CRA and ESDC will **engage national Indigenous organizations** to share the results of these research projects, and seek their views on what could be done to address the identified issues. These organizations include:
 - Assembly of First Nations;
 - Inuit Tapiriit Kanatami;
 - Métis National Council;
 - AFOA Canada; and,
 - National Association of Friendship Centres.

Building new partnerships

- We are also communicating results from our research projects **with provincial and territorial governments**, through bilateral Senior Management Committee meetings, and exploring potential opportunities for further collaboration.
- We continue to build strategic partnerships with **non-governmental organizations** to promote shared messages (e.g., Prosper Canada), or support program delivery (e.g., Chartered Professional Accountants of Canada for the CVIP).

Awareness & Education: Indigenous Community Outreach

Building relationships

- Jointly with Service Canada (SC), visited to date 625 of the 698 communities identified by SC to increase awareness and uptake of the Canada child benefit (CCB), and other benefits and credits available through the tax and benefit system.
- Launched a redesigned outreach and partnerships database to better track and report on outreach activities and partnerships.

Increasing community capacity and make it easier to obtain benefits and file taxes

- Simplify the CCB application process by, for example, simplifying the application form.
- Implement the Automated Benefits Application (ABA) in Yukon and the Northwest Territories.
- Make it easier to file tax returns, for example with the simplified T1SD, and use results from research projects and public opinion research to focus outreach efforts.
- Launched with SC a journey mapping project to better understand the challenges affecting applying for and the uptake of the CCB.

Awareness & Education: CVIIP

Strong program results to date

- Doubled the number of organizations holding clinics on reserves from 97 to 193.
- Recruited 116 new organizations (urban/on-reserve) serving Indigenous clients.
- Increased the number of Indigenous-focused organizations taking part including a 50% increase in Northern Canada.

Enhancing services

- Built and strengthened partnerships to further expand reach into remote and under-served locations (e.g., Partnerships with the Chartered Professional Accountants organizations).
- Leveraged technology to make filing easier (Auto-fill my return for CVIIP volunteers) and enhanced the online volunteer registration system.
- Developed an Action Plan in response to an ethnographic study on homeless individuals, including Indigenous, to enhance CVIIP services and access to benefits.

Awareness & Education: Communications

Communications initiatives

- A tax and benefit webinar specific to Indigenous peoples (March 21, 2018)
- Partnership with the Aboriginal Peoples Television Network to co-create photos for the Agency to use with tailored communication products
- A digital advertising campaign (\$200K) was launched mid-February 2018 (for six weeks) to promote benefits and credits, especially the Canada child benefit to Indigenous peoples.
- Tax time communication products:
 - Includes tailored tax tips, web content and social media messaging for an Indigenous audience
 - Working with the Department of Indigenous Services Canada to distribute content during tax season
 - File my return service



Development of an Indigenous Strategy

- The CRA is developing a **high-level framework** to outline our responsibilities and objectives related to the CRA's broader Indigenous portfolio. The Strategy's focus will be broader than our efforts to promote benefit uptake, though that remains a key component of our work.
- The CRA interacts with Indigenous individuals and entities in **three distinct capacities**, and the strategy will hold a commitment for each:
 - **Taxfilers:** Individuals, businesses, and governments who have an obligation to participate in the tax system, or would benefit from doing so
 - **Beneficiaries:** Individuals who are entitled to benefits, credits, or programs that are income-tested and require participation in the tax system.
 - **Clients:** Indigenous governments, on behalf of whom the CRA administers, collects, and enforces taxes
- We will share the document with our federal partners and seek input from national Indigenous organizations on our direction before finalizing.
- The Strategy will be supplemented by a tactical Action Plan, similar to those developed in 2016-2017, and 2018-2019. This will include concrete actions, that could potentially be publicly communicated.

Minister / Commissioner – Ministerial Briefing February 26, 2018 – 4 to 5 pm

Bilateral Discussion (15 minutes)

For Discussion (45 minutes)

1. Indigenous Service – Update
 - Yves Giroux, Wayne Lepine, Frank Vermaeten
2. Disability Tax Credit and Data Integrity – Update
 - Yves Giroux, Chantal Quinn, Frank Vermaeten
3. Hosted Contact Centre Solution – Update
 - Annette Butikofer, Frank Vermaeten, Mike Snaauw
4. Major IT Projects
 - Annette Butikofer, Kami Ramcharan

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Vachonwood, Nicole

From: Chasse, Valerie
Sent: February 22, 2018 03:50 PM
To: Patel, Shiraz
Cc: Harding, Chantal; Hoogsteen, Nicole
Subject: BINDER: Pre-briefs for the Minister's bilat
Attachments: Summary of changes CL.doc.docx; MinCo-26February2018-Indigenous-V3_MJ.PPTX; AC Indigenous backgrounder_2018-02-22_V2.docx; Engagement with Indig Pops_Min briefing_2018-03-01_V5.docx

Hi Shiraz

For the binder tomorrow

From: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC)
Sent: February-22-18 3:48 PM
To: Harding, Chantal <Chantal.Harding@cra-arc.gc.ca>
Cc: Watkins, Brenda <Brenda.Watkins@cra-arc.gc.ca>; Chasse, Valerie <Valerie.Chasse@cra-arc.gc.ca>; Hoogsteen, Nicole <Nicole.Hoogsteen@cra-arc.gc.ca>; Mackey, Lindsay <Lindsay.Mackey@cra-arc.gc.ca>; Amos, Marie-Josée <Marie-Josée.Amos@cra-arc.gc.ca>
Subject: RE: Pre-briefs for the Minister's bilat

Good afternoon Chantal,

Attached are the background materials in advance of tomorrow's pre-brief.

1. Indigenous Service – Update
 - We have attached the deck that SIB led, and may be referencing/using during the bilat.
 - o The second Word doc attached is an accompanying piece to the deck for Frank, which covers the ABSB portions of the presentation
 - You will also find a backgrounder on service efforts geared to the Indigenous population, with a high-level description of each initiative
2. Disability Tax Credit and Data Integrity – Update
 - As we discussed earlier, I have included the DTC info that was shared last week.

Thank you,
Kevin

From: Harding, Chantal
Sent: February 22, 2018 9:53 AM
To: Butler, Kathleen <Kathleen.Butler@cra-arc.gc.ca>; Pranke, Gillian <Gillian.Pranke@cra-arc.gc.ca>
Cc: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>; Watkins, Brenda <Brenda.Watkins@cra-arc.gc.ca>; Kolotylo, Adrienne <Adrienne.Kolotylo@cra-arc.gc.ca>; Harrison, Manon <Manon.Harrison@cra-arc.gc.ca>; Di Virgilio, Kim <Kim.Di-Virgilio@CRA-ARC.GC.CA>; Chasse, Valerie <Valerie.Chasse@cra-arc.gc.ca>; Hoogsteen, Nicole <Nicole.Hoogsteen@cra-arc.gc.ca>
Subject: Pre-briefs for the Minister's bilat

Good morning,

Frank will be attending a pre-brief with MinO tomorrow ahead of the Minister's Bilat on Monday.

There are three topics which Frank is asked to participate on:

1. Indigenous Service – Update
2. Disability Tax Credit and Data Integrity – Update
3. Hosted Contact Centre Solution – Update

A pre-brief has been scheduled for tomorrow morning and we would ask that your areas provide any additional material Frank may require in order to prepare for these meetings (i.e. speaking points, background information, etc.)

Please send material to ACO **by 3:00 today**.

Thank you.

Chantal Harding
Chief of Staff / Chef de cabinet
Assistant Commissioner's Office /
Bureau du sous-commissaire
Assessment, Benefit, and Service Branch /
Direction générale de cotisation, de prestation et de service
Chantal.Harding@cra-arc.gc.ca
613-954-7303

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AC Backgrounder – Indigenous Service

February 22, 2018

Service Canada Indigenous Outreach Partnership:

Service Canada (SC) and the CRA are collaborating to increase awareness and uptake of the Canada child benefit and other benefits available to Indigenous people on-Reserve and in Northern Communities. SC connected with 698 Indigenous communities to arrange in-person outreach visits and as of January 31, 2018, CRA and SC had provided outreach to 625 of these communities (with 65 declining outreach and 8 more visits being planned).

Simplifying the CCB Application Process:

The CCB application form is being modified to make it easier to understand; the revised application will be available in July 2018. We are also working on a checklist to guide clients through the application process and a Q&A document to help clients understand certain areas that have caused confusion in the past (e.g., marital status, shared custody, determination of the primary caregiver, etc.). The checklist and Q&A documents will be made available to band councils and CVITP volunteers as reference materials when helping clients. It is also our intent to make them available in multiple Indigenous languages.

Redesigned Outreach and Partnerships Database:

The Outreach and Partnerships Database is a horizontally-shared reporting tool for capturing CRA outreach activities to vulnerable populations throughout Canada. The tool aids in coordinating regional outreach goals and programs, planning regional events and activities, identifying priority audiences, and in delivery of regional activities and events. It allows for a central repository to record and report activities, evaluate effectiveness of individual events, and to share outreach statistics with senior management and the Minister.

The T1S-D Pilot:

The T1S-D Credit and Benefit Return has been redesigned and simplified into a questionnaire/tick-box style for registered Indians or persons entitled to be registered under the Indian Act with certain types of income. This simplified T1S-D will be piloted in Saskatchewan and Newfoundland and Labrador throughout the 2017 tax filing year (February to December 2018). The other provinces with an existing T1S-D will continue to use their regular T1S-D returns. Band offices can call the CRA to request the T1S-D return, as they are not available online. The CRA will also provide copies to the Regional Outreach Programs Officers (ROPOS) to distribute during their Outreach activities, and also to CVITP volunteers who help Indigenous people complete paper returns.

21(1)(b)

CPA Partnership and Pilots:

In summer 2017, CVITP engaged CPA Canada and the provincial CPA chapters in Ontario, Alberta, and British Columbia (BC) to explore areas of current and future collaboration. The objective of this work is to identify and eliminate any perceived barriers to the participation of CPAs in the volunteering through

the CVITP; and to increase the number of CPA volunteers. Based on current figures, the number of CPA volunteers have increased compared to last year.

The CVITP and CPA Ontario piloted a training package for CPAs to facilitate their volunteer participation for the upcoming tax season. Going forward, CVITP will support CPA organizations by tracking the contribution of their volunteers.

The CVITP reached agreements with CPA-BC, CPA-Ontario, and CPA-Alberta to pilot tax preparation clinics run primarily by CPA's in remote and northern communities during the spring of 2018. The objective of these pilots is to enhance outreach and CVITP efforts in the North.

Journey Mapping:

Through CRA's partnership with Employment and Social Development Canada (ESDC), and as part of the joint effort to increase the uptake of the Canada child benefit (CCB) with Service Canada, we are collaborating on a journey mapping effort to map and analyze the user experience of CCB recipients, for Indigenous people, and address challenges.

The objective of journey mapping is to better understand the path and channels current and prospective benefit recipients take to receive benefits and credits, such as the CCB, with the aim of serving them better. This initiative will better position BPD to make process improvements and to forecast future benefit recipient needs. Journey mapping results can also provide insights into the behavior of benefit recipients, which can be leveraged to better target our outreach and communication efforts. More generally, this initiative will build journey mapping capacity within the branch and BPD will share results and best practices within the CRA once complete.

Ethnography Study:

In March and April of 2017, the Accelerated Business Solutions Lab ("the Lab") at the CRA conducted an ethnographic study at shelters in Ottawa. This study sought to understand the experiences that homeless and housing-insecure Canadians have filing taxes and accessing benefits, particularly through the CVITP.

The study identified key barriers to tax-filing for people who are homeless or house-insecure. Although this report does not give explicit recommendations, it offers potential directions for the CRA to consider. The CVITP has developed an action plan to address related implications. This action plan will form part of the strategy to reach and support vulnerable Canadians-CVITP and Outreach 2018-2019 to 2020-2021.

Indigenous webinar:

The webinar, to be held on March 21, 2018, will present benefits and credits to an Indigenous audience. It will be promoted through Indigenous stakeholder organizations such as Friendship Centres and Indigenous Services Canada. The webinar is a new initiative by the CRA to reach out to Indigenous people. The webinar will be used to gauge interest in this format of communicating benefit and credit information.

Speaking notes for Frank Vermaeten
Ministerial briefing February 26, 2018 - Engagement with Indigenous Populations

SLIDE 3: AWARENESS & EDUCATION: INDIGENOUS COMMUNITY OUTREACH

2017: Building relationships

- We have made great strides with Service Canada in reaching out to Indigenous communities – to date 625 communities have been visited with positive results.
 - Of the total communities contacted, 65 declined outreach visits and 8 more visits are planned in the near-future.
 - Collaboration with Service Canada will continue into 2018-2019.
- Developed a new outreach database for CRA program areas to support outreach efforts and to better track visits.

2017-2018: Increase community capacity and make it easier to obtain benefits and file taxes

- The CCB application form is being modified to make it easier to understand; the revised application will be available in July 2018.
- The Automated Benefits Application (ABA):
 - The agreement with NWT is complete and we're targeting the system implementation by end of this fiscal year.
 - Yukon should follow shortly thereafter (Spring 2018) – they are reviewing the MOU.
 - Nunavut – We are in joint discussions with Nunavut, Service Canada and Statistics Canada to get Nunavut on the National Routing System, a requirement for adopting ABA. At this time there is no timetable for implementation.
- We are also simplifying the T1S-D form for Status Indians to make it easier to file a tax return.
 - NFLD and Labrador and Saskatchewan will use this form for the 2018 tax filing season.
 - The regular T1S-D form will continue to be available for the four remaining provinces that use the T1S-D.
- The CRA is focused on gathering better data on its vulnerable populations to provide more effective and efficient services.
 - We are using insights from two public opinion research studies; one on Indigenous peoples and one on general vulnerable populations; an ethnography study focused on shelter users and the Office of the Taxpayer's Ombudsman's

- systematic review on homeless and housing-insecure individuals (which also included Indigenous input) to explore ways to make tax filing easier.
- Many of the same observations were made in separate studies.
- The journey mapping project will look at the CCB application process from the client perspective to learn about their experiences, challenges, pain points, and how the process can ultimately be enhanced.
 - Focus is on the Indigenous peoples experience to increase uptake of the CCB.

SLIDE 4: AWARENESS & EDUCATION: CVITP

- The CVITP demonstrated strong results in 2017, as demonstrated through the figures on this slide.
 - The program is on track to have a successful filing season in 2018 and working hard to retain participating organizations from last year and in recruiting new organizations.
 - Early results indicate that the number of participating organizations and their volunteers will exceed that of last year.
- The CVITP has engaged with Chartered Professional Accountants Canada and provincial chapters to increase the number of CPA volunteers in the CVITP and to leverage CPAs to run CVITP clinics in remote Indigenous communities.
- Auto-fill My Return pilot: This year it is being phased in with 1,200 volunteers.
- An ethnographic study was conducted by SIB's Accelerated Business Solutions Lab in 2017 that sought to understand the experiences that homeless Canadians have filing taxes and accessing benefits, particularly through the CVITP.
 - The CVITP developed an action plan to respond to the recommendations of the study.

SLIDE 5: AWARENESS & EDUCATION: COMMUNICATIONS

- The CRA is working on a number of communications initiatives and products targeting the Indigenous population, including:
 - A tax and benefit webinar specific to Indigenous peoples on March 21, 2018.
 - An online advertising campaign to promote benefits and credits to Indigenous peoples, focusing on the Canada child benefit.
 - And general filing season communication products like tax tips and social media content.

From: [BPD DGO-ABSB / BDG DPP-DGCPS \(CRA/ARC\)](#)
To: [Furlong-Lachapelle, Lora](#)
Cc: [BPD DGO-ABSB / BDG DPP-DGCPS \(CRA/ARC\)](#); [Harding, Chantal](#); [Chasse, Valerie](#); [Patel, Shiraz](#); [Jones, Nicole](#); [Amos, Marie-Josée](#)
Subject: FW: CCB Celebration
Date: July 19, 2017 05:31:57 PM

Good afternoon, below are the speaking notes for Cynthia for BPD's celebration tomorrow.

- Today we celebrate the one year anniversary of the implementation of the Canada child benefit (CCB). In this new benefit year under the new CCB program, we successfully issued CCB payments totalling \$25 billion to 3.6 million families.
- The implementation was no small achievement. It required incredible effort, beginning with teams putting in place the actual program, working through the issues and problems that came up, to finally working with our Tax Centres to process the new applications. Thanks to the tremendous effort of our BPD staff in Headquarters and in the Regions, we were able to provide a very smooth transition to the new program.
- Our work in Benefit Programs Directorate makes a real impact on the lives of families with children.
- But we can also say that BPD is a very important part of every Canadian's day to day life, not only for the benefits we administer, but also for the work we manage through TRIS, IDENT, and the many federal and provincial/territorial datafeeds we administer.
- BPD has also taken on the challenge of managing the workloads for CVITP and Outreach. As one of the Minister's priorities in her mandate, she is committed to increasing the awareness of benefit programs in the indigenous community in Canada to ensure that every Canadian is receiving the benefits for which they might be entitled and ensuring that Canadians are able to file their returns in order to receive their benefit entitlements.
- Through the efforts of 16,500 CVITP volunteers and 2,885 community organizations, the CRA was able to provide assistance to Canadians in completing 765,000 income tax and benefit returns in 2016-2017
- BPD is also developing in the area of business intelligence and analytics. Through this work, we will be able to create better marketing and communications tools to reach out to even more Canadians
- The work undertaken in BPD is diverse and challenging, but the impact it has on the people we serve is extremely important. We can be very proud of all our accomplishments, and all of your efforts in the work that you do is very much appreciated.

Merci,

000023

Evelyne

(613) 948-1752

From: Furlong-Lachapelle, Lora

Sent: July 19, 2017 10:46 AM

To: Hall, Karen <Karen.Hall@cra-arc.gc.ca>

Cc: Harding, Chantal <Chantal.Harding@cra-arc.gc.ca>; Chasse, Valerie <Valerie.Chasse@cra-arc.gc.ca>; Patel, Shiraz <Shiraz.Patel@cra-arc.gc.ca>

Subject: CCB Celebration

Good morning Karen,

As discussed, Cynthia is happy to attend the CCB celebration event tomorrow in the 9th floor lounge from 1 to 1:30pm.

I understand that you are taking the opportunity to recognize the people and accomplishments of the CCB program as well as highlight CV1TP results.

Thank you, in advance, for providing some speaking point bullets for Cynthia by end of day today. I will make sure to share these with her as soon as possible.

Have a good day.

Lora Furlong-Lachapelle

Executive Assistant to the Deputy Assistant Commissioner | Adjointe exécutive de la sous-commissaire adjointe
Assessment, Benefit, and Service Branch | Direction générale de cotisation, de prestation et de service
Canada Revenue Agency | Agence du Revenu du Canada

tel 613-954-5890

000024

From: [Furlong-Lachapelle, Lora](#)
To: [Hoogsteen, Nicole](#)
Cc: [Patel, Shiraz](#); [Chasse, Valerie](#); [Harding, Chantal](#)
Subject: FW: OTO Meeting Request
Date: April 10, 2018 02:13:57 PM
Attachments: [image001.png](#)
[OTO draft deck \(clean\) - BPD.pptx](#)
[Speaking Notes for OTO deck v3 \(clean\) - BPD.docx](#)
[1_OTO_April2018_v4_nb-e_rev-LS - CVB.pptx](#)

FYI – BPD bringing hard copies for Frank and has sent e-copy to Cynthia. I will BBM Cynthia to let her know

From: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC)
Sent: April-10-18 1:16 PM
To: CRA.F ABSB_ISSUES / DGCPS_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPS_ENJEUX_ARC@cra-arc.gc.ca>
Subject: FW: OTO Meeting Request

Apologies, another update.

The program area is bringing copies for the attendees, but forwarded as I see Cynthia is dialing-in.

Kind regards,

Lindsay
613 957 8091

From: Jones, Nicole
Sent: April-10-18 12:54 PM
To: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>
Subject: FW: OTO Meeting Request

Good afternoon,

We will bring copies of the attached package for Karen for this afternoon's meeting:

- BPD deck
- Speaking notes for Cynthia
- CVB draft deck and notes

Thanks,

Nicole

000025

From: Jones, Nicole
Sent: April-09-18 4:33 PM
To: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>; Butcher, Karen <Karen.Butcher@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>; Caldwell, Brian <Brian.Caldwell@cra-arc.gc.ca>; McCann, Launa <Launa.McCann2@cra-arc.gc.ca>; Blanchard, Nicole <Nicole.Blanchard@cra-arc.gc.ca>; Khan, Adnan <Adnan.Khan@cra-arc.gc.ca>; Gagne, Marie-Josée <Marie-Josée.Gagne@cra-arc.gc.ca>
Subject: RE: OTO Meeting Request

For tomorrow morning's meeting with ACO, here is our part of the deck and our speaking notes. We are still waiting for CVB to provide their approved slides. However, at tomorrow's meeting with Cynthia, we are going to go through the ABSB slides and speaking notes. Hopefully, we will have CVB's piece then as well so that Cynthia can see the whole package.

Kevin, this version contains some very small changes from MJ's team compared to the version that Karen signed-off.

Thanks,

Nicole

From: Blanchard, Nicole
Sent: April-06-18 2:17 PM
To: Jones, Nicole <Nicole.Jones@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>; Khan, Adnan <Adnan.Khan@cra-arc.gc.ca>; Caldwell, Brian <Brian.Caldwell@cra-arc.gc.ca>
Subject: RE: OTO Meeting Request

Hi Nicole,

As discussed, due to the time pressure, we will work to get our slides approved on each our respective sides. Then Monday, we can merge them together into one deck. I can confirm that the format / content that you have provided in the revised deck aligns well with what we are preparing.

Thanks,

Nicole Blanchard

Manager, Benefits Validation and Compliance Section (BVCS)

Gestionnaire, Section de la validation et observation des prestations (SVOP)

Assessment and Verification Division (AVD)/ Division de la vérification des cotisations (DVC)

Individual Compliance Directorate (ICD) / Direction de l'observation des particuliers (DOP)

Collections and Verifications Branch / Direction générale des recouvrements et de la vérification

395 Terminal Avenue, 3rd floor, office 3044

Telephone: 613-952-9948

000026

From: Jones, Nicole
Sent: April-06-18 1:42 PM
To: Blanchard, Nicole <Nicole.Blanchard@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>; Khan, Adnan <Adnan.Khan@cra-arc.gc.ca>; Caldwell, Brian <Brian.Caldwell@cra-arc.gc.ca>
Subject: RE: OTO Meeting Request
Importance: High

Hi Nicole,

Further to Mike and Adnan's discussion yesterday, here is a revised cut at the shortened deck from our end. How quickly do you think you can add in your slides? We would like to send this to Karen this afternoon.

Also attached are some speaking notes that we have prepared for Cynthia (please note that we are reaching out to our Outreach colleagues for some text on CVITP for both the deck and notes).

Thanks,

Nicole

From: Khan, Adnan
Sent: April 5, 2018 2:53 PM
To: Jones, Nicole <Nicole.Jones@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>; Caldwell, Brian <Brian.Caldwell@cra-arc.gc.ca>; Froes-Neves, Mélanie <Melanie.Froes-Neves@cra-arc.gc.ca>
Subject: RE: OTO Meeting Request

We do have comments. I will call Mike later this afternoon to provide our initial feedback.

Adnan

From: Jones, Nicole
Sent: April 5, 2018 1:56 PM
To: Khan, Adnan <Adnan.Khan@cra-arc.gc.ca>
Cc: Fowler, Michael <Michael.Fowler@cra-arc.gc.ca>; Caldwell, Brian <Brian.Caldwell@cra-arc.gc.ca>
Subject: FW: OTO Meeting Request
Importance: High

Hi Adnan,

000027

Further to the email yesterday, we have now received confirmation that the meeting will take place on April 13 (please see email below). As such, we have been asked by our ACO to provide the draft deck by Monday. Will you be able to provide comments/changes on the draft deck that we shared with you **by tomorrow** (see attached)?

Thank you,

Nicole Jones
Benefit Programs Directorate | Direction des programmes de prestations
Assessment, Benefits, and Service Branch | Direction générale de cotisation, de prestation et de service
Canada Revenue Agency | Agence du revenu du Canada
750 Heron Road | 750 Chemin Heron
Ottawa ON K1A 0L5
Telephone | Téléphone **613-941-6115**
nicole.jones@cra-arc.gc.ca

From: Furlong-Lachapelle, Lora
Sent: April-05-18 12:46 PM
To: Butcher, Karen <Karen.Butcher@cra-arc.gc.ca>; BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>
Cc: Harding, Chantal <Chantal.Harding@cra-arc.gc.ca>; CRA.F ABSB_ISSUES / DGCPS_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPS_ENJEUX_ARC@cra-arc.gc.ca>
Subject: FW: OTO Meeting Request

Hi Karen,

This meeting has been confirmed for April 13 at 9:30. I will ask OLO to include you on the invitation.

To date, the attendees are as follows:



I will be confirming with Frank shortly if he plans to attend as well.

I think a meeting early next week would be prudent to review/discuss your draft deck and to bring Frank and Cynthia up to speed on conversation, to date, with CVB. Please provide the draft deck **by Monday, April 9**. I think a teleconference with Mike, Josee, Nathalie and Mireille should also be planned for later next week.

Invitations to follow.

000028

From: Furlong-Lachapelle, Lora
Sent: March-16-18 4:47 PM
To: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>; Butcher, Karen <Karen.Butcher@cra-arc.gc.ca>
Cc: CRA.F ABSB_ISSUES / DGCP ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCP ENJEUX_ARC@cra-arc.gc.ca>
Subject: RE: OTO Meeting Request

Looks like this meeting will likely be pushed to early-mid April.

The only additional information I received:

21(1)(b)

Cynthia agrees that a deck is likely the best format so we can share in advance of the meeting and then add speaking notes for Cynthia. Thinking there will need to be conversation with CVB to ensure that materials don't duplication and flow well from one to the other.

We'll let you know when we get the meeting date.

From: Furlong-Lachapelle, Lora
Sent: March-12-18 4:26 PM
To: BPD DGO-ABSB / BDG DPP-DGCPS (CRA/ARC) <BPDDGOABSBG@cra-arc.gc.ca>; Butcher, Karen <Karen.Butcher@cra-arc.gc.ca>
Cc: CRA.F ABSB_ISSUES / DGCP ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCP ENJEUX_ARC@cra-arc.gc.ca>
Subject: FW: OTO Meeting Request
Importance: High

Hi Karen,

Please see the request below from the Ombudsman (through the Ombudsman Liaison Office (OLO)). Cynthia has agreed to attend this meeting. I plan to follow-up shortly with OLO for more details of the angle of this discussion. I will be sure to share what I learn.

Please note that the Ombudsman "...is also asking that CRA provide her with information on any initiatives that relate to CCB at the meeting." CVB is also invited to attend this meeting, so once I know more on the angle, I am thinking that preparation may involve collaboration with your CVB counterpart.

000029

I'll be in touch as soon as I have more info.

From: Heron, Angella

Sent: March-09-18 2:08 PM

To: CRA.F ABSB_ISSUES / DGCPs_ENJEUX F.ARC <CRA_ABSB_ISSUES_DGCPs_ENJEUX_ARC@cra-arc.gc.ca>; CRA.F CVB-ACO-Issues / DGRV-BSC-Enjeux F.ARC <CRA.F-CVB-DGRV-Dist_ISSUES/DGRV-BSC-ENJEUX-F.ARC@cra-arc.gc.ca>; Brunette, Chantal <Chantal.Brunette@cra-arc.gc.ca>

Cc: Meighan, Karington <Karington.Meighan@cra-arc.gc.ca>; Alain, Joan <Joan.Alain@cra-arc.gc.ca>; Mitchell, Nancy <Nancy.Mitchell@cra-arc.gc.ca>

Subject: OTO Meeting Request

Importance: High

Good Afternoon,

The Ombudsman would like the opportunity to meet with your respective Assistant Commissioner to 21(1)(b). She is also asking that CRA provide her with information on any initiatives that relate to CCB at the meeting.

The location for the meeting will be 250 Albert and it is expect to last approximately one hour. The Ombudsman's availability for the end of March is limited so we are asking if you could select which of the following dates best fits into your schedule:

- March 23
- March 27 (morning only)
- March 28

After receiving your response, we will liaise with the OTO to arrive at a mutually convenient date and time. Please provide your response at your earliest convenience as it is a very short timeline.

If you have any questions or concerns, please do not hesitate to contact me.

Thank you.

Angella Heron

Senior Liaison Officer | Agente principale de liaison

CRA Ombudsman Liaison Office | Bureau de liaison avec l'ombudsman à l'ARC

Appeals Branch | Direction générale des Appels

250 Albert Street, 12th floor | 250 rue Albert, 12^e étage,

Ottawa, ON K1A 0L5

Tel: 613-960-2196

Angella.Heron@cra-arc.gc.ca

000030