

CANADA REVENUE AGENCY DETAILED ACTION PLAN

to the recommendations in the Access to Benefits for Hard-to-Reach Populations Report of the 2022 May Reports of the Auditor General of Canada

Report Ref. No.	OAG Recommendation	Departmental Response	Description of Final Expected Outcome/Result	Expected Final Completion Date	Key Interim Milestones (Description/Dates)	Responsible Organization/ Point of Contact (Name, Position, Tel #)	<i>Indicator of Achievement</i> (For Committee Use Only)
1.31	<p>CRA, ESDC and Statistics Canada should establish a joint prioritization, planning, monitoring and reporting process to improve how they measure the take-up of benefits. This should include:</p> <ul style="list-style-type: none"> • Assessing available specific data holdings on hard to reach populations • Defining and implementing actions to collect additional data on specific hard to reach populations • Improving the use of data in measuring benefit take-up and the sources of gaps in benefit take-up. 	<p>Agreed. The CRA will continue to work with ESDC to ensure alignment in the prioritization, planning, and monitoring of work related to the take-up of benefits by hard-to-reach populations. The CRA will also work with ESDC to leverage Statistics Canada's expertise and broad socio economic data (including through the 2021 Census) to gain more insight into hard-to-reach populations, and help measure the take-up of benefits. This will include an assessment of available data in support of this work and what would be required to facilitate and align ongoing monitoring of progress.</p> <p>The CRA notes that the take-up of benefits can be a limited measure of performance as it is often not possible to attribute program activities directly to a change in the take-up rate. This challenge can be exacerbated by incomplete data and sources of data that are updated on an infrequent basis while the population being targeted changes constantly. The take-up rate of benefits has and will continue to be used to target activities for particular vulnerable populations (e.g., Indigenous communities), while the CRA works with ESDC and Statistics Canada to improve the use of data in support of monitoring and reporting.</p>	<p>CRA, ESDC, and Statistics Canada have aligned prioritization, planning, and monitoring of the take-up of benefits for hard to reach populations.</p>	<p>End of fiscal year 2023-24</p>	<p>Fall 2022 : The CRA, ESDC and Statistics Canada to formalize governance for ongoing prioritization, planning, and reporting on the take-up of benefits for hard to reach populations.</p> <p>Winter 2023: The CRA will work with ESDC and Statistics Canada on a second iteration of a project to leverage the most recent Census in order to better understand tendencies in benefit take-up for different segments of the population.</p> <p>Summer 2023: The CRA, ESDC and Statistics Canada to finalize an assessment of current practices, methodologies and data used in planning, monitoring and reporting of the take-up of benefits and identify specific opportunities and measures to improve processes, including the alignment of definitions, the clarification of roles and responsibilities, and associated data requirements.</p> <p>Fall 2023: The CRA will begin implementation of opportunities to improve the use of available data and the collection of data, including administrative and qualitative data.</p> <p>Winter 2024: Assess work to date and establish a plan for continuous improvement and refinement of measuring take-up of benefits for hard to reach populations.</p>	<p>Maxime Guénette, Assistant Commissioner, Service, Innovation and Integration Branch, 613-957-3508</p>	

1.45	To better understand the effectiveness of outreach approaches, CRA and ESDC should develop and implement consistent results-based performance measures relating to targeted outreach to hard-to-reach populations.	<p>Agreed. The CRA will work to identify additional ways to measure the effectiveness of outreach approaches, recognizing the limitations inherent in the process (e.g., the CRA does not currently collect personal data of those individuals who participate in outreach events). The CRA does however measure the effectiveness of its outreach efforts to those served through in-person or community visits where information about accessing benefits and credits is shared and where clients are either provided with direct, hands on support or are directed to resources where this support can be obtained (e.g., Northern Service Centres, CVITP tax clinics, etc.). For these types of interactions, the CRA gathers and reports out on metrics pertaining to the number of individuals who have accessed the support provided, including the number of tax returns filed as a result (e.g., 574,330 individuals accessed CVITP clinics resulting in the filing of 638,610 tax and benefit returns in 2021) and the number of individuals that attended outreach sessions. Over the 2017 to 2020 period, the CRA has demonstrated an increase in individuals who have accessed CVITP clinics by over 7%, the number of tax returns filed by over 11%, and the number of individuals that were assisted during outreach sessions by over 15%.</p> <p>The CRA is in agreement that other measures be explored and will work with ESDC and other partners in order to do so, while adhering to CRA's authorities under the Income Tax Act and the Privacy Act.</p>	<p>CRA has an improved capacity to measure the effectiveness of outreach approaches and evaluate program effectiveness.</p> <p>Improved consistency among CRA and ESDC outreach performance measures.</p>	End of fiscal year 2023-24	<p>Spring 2022</p> <ul style="list-style-type: none"> Establish a CRA working group to review and refine Benefits Outreach key performance indicators (KPIs) and develop a pilot project for outreach activities to measure program effectiveness. <p>Summer 2022</p> <ul style="list-style-type: none"> Finalize KPIs Establish monitoring and reporting processes for new/revised KPIs <p>Fall 2022</p> <ul style="list-style-type: none"> Implement KPI pilot in select outreach activities. Collect and analyze data, and establish benchmarks. <p>Winter 2022</p> <ul style="list-style-type: none"> Review pilot implementation, adjust as necessary in preparation for program-wide rollout. Prepare for first full year of revised KPI monitoring. Continue working with ESDC colleagues to share KPI and pilot developments and best practices, plan any agreed upon changes to KPIs and/or data collection with a view to standardize for next fiscal. <p>2023-24:</p> <ul style="list-style-type: none"> Fully incorporate KPIs into CRA outreach activities. Monitor revised KPIs for first full year. Share experiences and revised KPIs with ESDC colleagues and further integrate/coordinate to improve consistency of performance measures. 	Gillian Pranke, Assistant Commissioner, Assessment, Benefit, and Service Branch, 613-954-6143	
1.59	To improve the integration and effectiveness of targeted outreach, the CRA and ESDC should collaborate to establish a seamless client service experience to address the needs of those requiring a high level of support to access benefits.	<p>Agreed. The CRA has actively collaborated with ESDC on outreach activities targeted to specific vulnerable or hard-to-reach populations for the past 5 years, and will continue to do so in pursuit of a seamless client service experience. This collaboration is evidenced through initiatives such as, joint service offerings through the Northern Service Centres (NSCs) in the territorial capitals of Whitehorse, Yellowknife, and Iqaluit, the Let Us Help You Get Your Benefits! pilot, the Canada Child</p>	<p>Increased coordination of CRA and ESDC outreach activities.</p> <p>Increased joint CRA-ESDC outreach activities (i.e. super clinics, Indigenous community outreach activities).</p> <p>Service gaps are identified and mitigating solutions are implemented.</p>	End of fiscal year 2023-24	<p>Spring 2022-:</p> <ul style="list-style-type: none"> Continue the ESDC/ISC/CRA Inter-departmental CCB Uptake Working Group to collaborate on concrete options to increase benefit uptake while taking the OAG's findings and recommendations into consideration when evaluating new initiatives or approaches. Establish a CRA-ESDC Outreach working group to discuss increased 	Gillian Pranke, Assistant Commissioner, Assessment, Benefit, and Service Branch, 613-954-6143	

		<p>Benefit Journey Mapping project and nudge letter initiatives.</p> <p>Additionally, through coordinated outreach activities such as super clinics held across the country, CRA and ESDC offer complimentary services to those individuals requiring a higher level of individual support to access benefits.</p> <p>The CRA will work with ESDC to identify opportunities to further improve upon the service provided by individuals requiring a high level of support to access benefits. This collaboration will include defining the extent of the support that both entities will provide, determining any service gaps, and developing specific approaches for certain populations, while adhering to our respective roles and responsibilities within CRA's mandates and authorities under the Privacy Act and Income Tax Act.</p>			<p>collaboration/coordination on outreach activities, and analyze the service flow for various common client groups to determine gaps and propose solutions.</p> <p>Summer 2022:</p> <ul style="list-style-type: none"> Existing CRA-ESDC senior management bilateral meetings will include increasing outreach collaboration and developing a seamless client service experience for those requiring a high level of support as standing agenda items. <p>Fall-Winter 2022:</p> <ul style="list-style-type: none"> The CRA-ESDC working group will prepare a recommendations report for senior management covering opportunities to improve collaboration and address service gaps for those requiring a high level of service. <p>Fall-Winter 2022:</p> <ul style="list-style-type: none"> CRA and ESDC senior management to discuss recommendations report and determine which recommendations will be implemented by their programs. CRA and ESDC outreach programs begin implementing approved recommendations. <p>Summer-Fall 2023:</p> <ul style="list-style-type: none"> The working group continues to meet to keep its members apprised of developments in implementing the recommendations. <p>Winter 2023:</p> <ul style="list-style-type: none"> Approved working group recommendations are implemented in relevant CRA and ESDC programs. 		
--	--	---	--	--	---	--	--