



Effecting Change: Improving Service through Systemic Examinations

Sherra Profit

Taxpayers' Ombudsman for Canada

November 8, 2019

9:00am – 4:30pm

Summary

In this one-day workshop, Sherra Profit, Canada's Taxpayers' Ombudsman, will discuss her role in improving the Canada Revenue Agency's (CRA) service through individual and systemic examinations. She will speak to the significance of the power to report, the value in addressing issues of fairness, and the importance of ensuring the administration of government services does not further marginalize vulnerable populations.

Ms. Profit will focus on her systemic examination process and discuss how she identifies and reviews systemic issues related to CRA's service. Against the backdrop of recommendations she has made and the tools available to her, this workshop will develop your skills in identifying systemic issues, researching techniques, writing persuasively, presenting compelling recommendations, and measuring success.

With Ms. Profit's guidance, you will have the opportunity to work together to examine individual and systemic issues to determine the appropriate actions, research, and methods of resolution.

This workshop will illustrate the importance of universally accessible redress mechanisms that treat everyone equitably, while putting your critical thinking, conflict management, communication and mediation skills to the test.





Outline

9:00am-10:15am - Introduction

- Creation of the Taxpayers' Ombudsman
- Role and mandate
- Taxpayer Bill of Rights
- Equality, equity and fairness
- Individual complaint examinations
- Addressing systemic issues

10:15am-10:30am – BREAK

10:30am-12:00pm - Key elements to effecting change

- Individual complaints
- Identifying vulnerable populations
- Identifying systemic issues
- Research techniques and addressing individual and systemic issues
- Writing persuasively
- Making compelling recommendations
- Measuring success

12:00pm-1:30pm – LUNCH

1:30pm-2:15pm – Case Studies – Small Group Exercise

- You will be presented with case studies depicting issues the Office of the Taxpayers' Ombudsman examines. You will be tasked with:
 - Identifying the mandate-related issues
 - Determining whether the issues are individual or systemic
 - Finding the appropriate actions/tools to address the issues
 - Using persuasion in presenting your case and crafting compelling recommendations

2:15pm-3:15pm - Presentation and Discussion of Group Findings

3:15pm-3:30pm – BREAK

3:30pm-4:30pm – Wrap up Discussion, Questions, Comments, Future Directions

- Importance of processes for change and accessible redress mechanisms
- The broader perspective in public policy and governance

Workshops on Social Science Research (WSSR)
1455 de Maisonneuve W. – H1 2Z5 30
Montreal, Qc H3G 1M8
Telephone: 514-848-2424 x7854, x5473





Required Readings

- 1) Sherra Profit. 2019. "[Taxpayers' Ombudsman Guide](#)", *Office of the Taxpayers' Ombudsman*. Ottawa.
- 2) Governor General. 2007. "[ORDER IN COUNCIL P.C. 2007-0828](#)", *Prime Minister's Office*. Ottawa.
- 3) Sherra Profit. 2019. "[Annual Report 2018-2019: Breaking Down Barriers to Service](#)", *Office of the Taxpayers' Ombudsman*. Ottawa.
- 4) Paul Dubé. 2017. "[Ombudsman Strategies for Getting to Yes and Beyond: Acceptance and Implementation of Recommendations](#)", *Office of the Ombudsman of Ontario*. Ottawa.

Additional Resources

- 1) Sherra Profit. 2019. "[Systemic Report: Fair Warning](#)", *Office of the Taxpayers' Ombudsman*. Ottawa.

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