

**MINUTES OF THE NATIONAL UNION-MANAGEMENT CONSULTATION COMMITTEE
MEETING BETWEEN THE CANADA REVENUE AGENCY (CRA) AND
THE UNION OF TAXATION EMPLOYEES (UTE)
JUNE 13, 2019**

OPENING REMARKS

The Commissioner welcomed the parties to the meeting. He mentioned that a lot has happened since the last meeting and he looks forward to another constructive discussion on important issues. He mentioned the changes within the ranks of senior management. He also talked about the service transformation activities and the different opportunities to further refine services to Canadians. He mentioned the efforts to ensure the approach, tools, policies and organizational structure enhanced a better compliance strategy and include fairness and integrity of Canada's tax system. As the elections are coming up, he mentioned planning and ensuring that CRA is well prepared for the new government.

The UTE National President thanked everyone for attending the meeting. He recognized the importance of these discussions and exchanges of information. He also mentioned that the election might bring media attention since they will support the Quebec members who could be faced with a precarious situation. He hoped for a productive and good meeting.

Union-Management Approach

The Montreal Regional Vice-President stated that the principles of the Union-Management Approach (UMA) are not being valued and the collaboration is not happening, as it should. He stated that there is confusion between communicating a decision and consulting. He referenced management's decision to amalgamate the Employee Assistance Program (EAP) and Informal Conflict Resolution (ICR) committees to include the Well-being (WB) component without consultation. UTE does not understand the rationale behind this decision and consultations should have happened in the spirit of UMA. As the co-chair of the National UMA Steering Committee, he is hoping that this decision will be revisited. He mentioned being committed to working towards employee well-being and with more explanation, they are willing to consider the approach.

The Assistant Commissioner, Human Resources Branch (AC, HRB) stated that this item is on the agenda and it would be discussed later. Any other examples of consultation issues should be flagged to the National President who will then inform management. He also stated that the UMA 103 workshop was launched in October 2018. Last fall, the Canada School of Public Service (CSPS) announced that two of the three UMA 102 online courses would be discontinued in February 2019 due to a change in the service provider. The courses have been replaced by four new courses and employees who had already completed the previous version of the UMA 102 training were not required to complete the new version. The AC, HRB also announced that Andy Schmaus from the Ontario Region had joined the National UMA Steering Committee as a management representative and that the next committee meeting would take place shortly. The National UMA Steering Committee has been overseeing the implementation of UMA

across the Agency and it has requested that branches and regions report on the status of their UMA training activities. At this time, areas for improvements may be identified, and collaboration will continue to maintain our strong union-management relations. Based on its oversight role, this committee will meet once per year.

The National President mentioned that the example used earlier was to illustrate how UMA was not applied properly and that it should always be applied consistently.

The Quebec Regional Vice-President referenced the staffing redesign meetings as another example where collaboration between management and union are not done appropriately. These meetings should have been scheduled in consideration of both parties' availabilities.

The Commissioner stated that he remained committed to adhere to the spirit of UMA.

Collective Bargaining Process

The UTE Second National Vice-President expressed UTE's disappointment that after one year, it has come to an impasse and the establishment of a Public Interest Commission (PIC). The key elements are term conversion, work life balance in call centres and leave provisions for members. In the interest of both parties, it would be best to settle.

The Commissioner expressed his desire to make progress and he insisted on keeping the dialogue open to resolve issues.

The UTE National President shared that he met with the Member of Parliament from Hull/Aylmer and also sent a letter to the new president of Treasury Board Secretariat (TBS) and that TBS encourages the parties to talk. The UTE are keeping the lines of communication open to discuss any issues at the bargaining table in the interest of both employees and members.

Service by Design

The Chief Service Officer (CSO), said that since last December, as part of the development of the Service Policy Framework, work has been done to define the foundation pieces (vision, values, guiding principles and service identity) needed to reinforce the new direction. Between February 15 and March 29, 2019, in-person engagement sessions were held with employees across the country to seek their perspective on service transformation to help the CRA better support them in providing more client-centric services. They were complemented by an online engagement tool, which allowed all employees an opportunity to provide feedback. Public consultations were also launched to consult individuals on service improvements. The online consultation ran since April until June 18, 2019, while a number of in-person dialogues and focus groups took place throughout Canada in May and early June. Some of the positive messages were a general appreciation of CRA staff, particularly of call centers and all the efforts made to make the filing experience simple such as Auto-fill my return and the information available on My Account. In terms of areas for improvement, the feedback can be summarized under four different themes:

1. The personalized and proactive services example provides dedicated lines for certain segments of the population about what could apply to their situation.
2. Enhanced awareness and education as well as make better, simpler and more accessible information.
3. Enhanced accessibility regarding in-person services, longer call center hours, shorter wait times, and faster resolution of issues.
4. Keeping up with the times to leverage emerging technologies to support service delivery.

A study is also being conducted to understand how Canadians interact with the CRA, even on the reasons why clients continue to come to CRA offices for service and why those interactions do not always occur through our formal service channels. This will allow knowing more about the nature of these enquiries and identifying areas for improvement. From almost 5,000 clients with whom we engaged, the vast majority were trying to address a personal tax matter and trying to take care of an administrative task, such as dropping off forms, looking for forms or guides or making a payment. The second phase of this study will be undertaken in July and August. As part of our design jam initiative, we will be developing a toolkit that includes personas and journey maps to define and improve the end to end client experience. Over and above the employee engagement sessions and the online engagement tool, the Service Council continues to look at ways in which it can support and advance our service transformation agenda through employee engagement. The CRA will be launching its second Service Culture survey on June 17 to include employee's feedback to better adapt to service transformation.

The UTE National President stated that counter services are important for taxpayers and for CRA. He referenced service counters in Revenue Quebec which offer personalized services to Taxpayers. He is pleased that CRA would look at improving services internally and externally including counter services.

Collections and Verification's Compliance

The Assistant Commissioner, Collections and Verification Branch (AC, CVB) mentioned that the branch is exploring development opportunities and implementation of proactive compliance and service approaches in the program delivery to better understand the client's needs. He said the Employer Compliance Audit Program Renewal (ECA) promotes compliance through targeted outreach education and information services such as webinars, nudge campaigns, seminars, and the introduction of outreach audits. Those information services are intended to increase business and taxpayer awareness and education by providing opportunities for employers to self-correct and increase voluntary compliance. The education strategy targets a wide audience known to have a high level of non-compliance and may also include letter campaigns, direct consultation with industry associations and external webinars delivered by CRA.

The AC, CVB also spoke about the Northern Resident Deduction and the complex nature of the credit that makes it difficult for individuals to claim it correctly. This often results in errors and additional reassessments. A nudge letter campaign was launched to educate taxpayers who had repeatedly been reviewed as a result of recurring errors. These letters were sent to individuals who may qualify for the northern resident's deductions and it included information about the deduction and how to correctly claim the credit.

The UTE National President said that it is an interesting and proactive initiative.

Collection and Verification Branch Jobs and Staffing

The AC, CVB spoke about the work description activities and the evolution of CVB jobs. He stated that CVB is currently reviewing several specific work descriptions where concerns were identified by field employees and management during post Service Renewal consultations. The branch is currently in the process of reviewing these specific work descriptions. He stated that the success of this project relies on a collaborative and supportive approach to minimize any further operational impacts. The UTE has been engaged throughout the entire project, including communication approaches. In February 2019, communications were sent out informing employees that the focus of the review was set to four MG jobs. As the project progresses, CVB will be considering the impact on Tax Services Offices (TSO) where employees perform the same workloads as the National Verification and Collection Centres and Hybrid sites.

The Quebec Regional Vice-President explained that following these consultations, it appeared that the employer's objective was to downgrade the NVCC's jobs for all MGs and SPs. He mentioned the need to consider impacts and he hopes that the members were incorrect in thinking the employer wanted to downgrade positions.

The AC, CVB reassured that it is not the employer's goal to downgrade levels but to ensure the work descriptions accurately reflect the work being done and that the appropriate classification are assigned.

The UTE National President said he appreciates the consultation on this item and mentioned the importance of the members being reassured.

The AC, CVB spoke about the new Service Acceleration Officer (SAO) job. He stated that the program offers an enhanced service by helping taxpayers better understand their filing or payment obligations and improves consistency and quality to clients. As a result of the success of the project, the 23 temporary SAO positions created during the pilot were deemed permanent and that the number is expected to grow.

The UTE National President asked where the SAO are located in the Quebec region.

The AC, CVB said that the positions are located in the Quebec TSO, Shawinigan TSO and Laval TSO.

The Commissioner stressed the importance of demonstrating success in fulfilling expectations of service with the resources currently in place.

Problems with the Collection and Verification Workload Management System (CVWMS)

The Atlantic Regional Vice-President and co-chair of the Tech Change Committee stated that many problems occurred with this system and 164 issues were sent to the Technology and Business Intelligence Directorate in CVB. The issues are affecting UTE members in many ways as team leaders are not happy with the production and the

system is often not working properly. Some issues have been corrected and others will be discussed at the upcoming meeting scheduled on June 26, 2019. He is hoping that the June meeting will bring better results.

The AC, CVB stated that the CVWMS was launched to replace the Système Universel Delpac System, among others. Regular engagement sessions with Headquarters (HQ) and field users continue to seek input and feedback on the new platform and reassure users about upcoming fixes and enhancements. Management is aware of concerns about system issues and remains dedicated to addressing these issues on a priority basis. The remainder of the issues are scheduled to be addressed in the June and October 2019 releases. The project continues to ensure field employees are prepared for the coming changes and CVB recognizes the need to leverage lessons learned to minimize issues with future releases of the CVWMS.

The UTE National President is appreciative that the employer is recognizing the issues. He stressed the importance of consulting the employees and the users to address these issues.

The Commissioner mentioned that he was proud that the agile methodology was used for early testing to allow for issues to be identified before the user engaged with the systems.

Action Item:

- Lessons learned will be shared at the June CVWMS meeting.

Call Centres

The Rocky Mountain Regional Vice-president stated that the Call Centre Agent Assessment Tool (CCAAT) implementation and the union briefings were not done appropriately and were restricted to new hires only. Members are complaining about the completion of incident reports, the lack of experience of team leaders and the calibration exercise.

The Atlantic Regional Vice-President mentioned there were concerns with dropped call issues.

The UTE National President raised that system malfunctions such as dropped calls and prompt screens delays are mostly affecting the employees. He asked for relief to UTE members in the call centres.

The Deputy Assistant Commissioner, Assessment, Benefit, and Service Branch (DAC, ABSB) mentioned that Hosted Contact Centre Service (HCCS) is a technology used to replace the aging telephony infrastructure to allow better service to Canadians. The system has been in place for six months and the number of challenges encountered are improving. She also stated that a task force of technical specialists from CRA, Shared Services Canada (SSC), IBM and Rogers along with SSC on-site has been established to help with the resolution of the outstanding issues. To help address the challenges, an agent survey provides stakeholders with the necessary information to troubleshoot and solve issues while being able to identify the number of incidents in the call centres. It was noted that agents in call centres across the country are highly involved and engaged in discussing new or ongoing issues and that the HQ teams are working closely with local management. Monitoring and calibration of the performance of the HCCS platform will continue as the solution is bedded down.

The Commissioner is pleased to see the employees' enthusiasm in embracing the new technology and collaborating to work through the issues.

The AC, CVB stated that the Debt Management Call Centres and the other call sites experienced frustration with the numerous delays due to technical difficulties. No major issues with the HCCS application have been identified and the lost connections are not affecting the taxpayer experience.

The DAC, ABSB stated that the Call Centre Assessment and Rehire Tool (CCART) was launched in 2015 in order to bring greater consistency in the evaluation of term employees and provide a fair and transparent approach for the rehiring of term employees. Prior to proceeding with the national rollout, the CCART was presented to the national UTE and recommendations were incorporated into a revised product. At a subsequent meeting to share the revised tool, the UTE suggested that the tool be expanded to include the evaluation of all agents – both determinate and indeterminate. ABSB agreed to explore the feasibility of leveraging the tool for all agents. The new tool was subsequently renamed from CCART to Call Centre Agent Assessment Tool (CCAAT). ABSB worked towards a uniform roll out across the country but in order to limit the impact of change on agents and team leaders during filing season, the call centres were provided with flexibility with respect to the local roll out of this new tool with a caveat that all sites would be using the CCAAT in time for the beginning of the employee PA cycle in September 2019. At present, Hamilton and Montreal are in the process of rolling out the tool with all other sites already having done so.

EAP and ICR Advisory Committees

The Pacific Regional Vice-President stated that UTE was not consulted on the new EAP and ICR organizational structure change that intended to merge both Committees.

The AC, HRB stated that he understood that the consultation process did not happen, as it should have. He mentioned that the lack of proper consultation does not necessarily lead to a wrong decision. The decision to merge both committees and to add the Well-Being component will offer better results and a more integrated approach for employees across the organization. Moving forward, he asked for feedback on the structure of the committee and the frequency of the meetings from the three options that have been proposed. The first option is to have two full-day in-person meetings per year. The second is to have a one-day in-person meeting supplemented with additional touch points, and the third option does not include in-person meetings but offers touch point updates to be sent on a quarterly basis. The first option is management's preferred option and the Audit, Financial and Scientific (AFS) group also agreed to management's preferred option. He asked to hear from UTE in order to move forward and schedule the first meeting in the fall.

The First National Vice-President stated that they were faced with the decision to merge both committees without understanding the correlation between ICR with EAP. He also stated that UTE's needs are different than AFS'. He said that consultation did not happen and they were not offered to express their concerns about this new structure. He is requesting a consultation before moving forward.

The National President reiterated the importance of the consultation and that the decision can remain as long as the consultation takes place. The decision to merge EAP and WB

makes sense but they would like to understand the rationale to incorporate ICR. The impression was given that this was done to save time, meetings and money.

The Montreal Regional Vice-President would like to understand the link between EAP and ICR.

The AC, HRB mentioned that the initiative undertaken is not driven to save time or money. He stated that the rationale was to bring together the important components under the Respectful workplace and well-being three year strategy that the Agency has adopted which includes EAP, ICR and WB. He agreed to offer a formal consultation session with UTE in order to allow better understanding of the objective.

Action Item:

- Consultation will be arranged to discuss the objective of the amalgamation.

Public Service Employee Survey (PSES)

The National PSES champion stated that from August 20, 2018 to October 5, 2018, the CRA was one of 86 departments to participate in the PSES conducted by Advanis, a Canadian research company, on behalf of the TBS.

The CRA-level results were released on February 12, 2019, and Branches and regions, and lower organizational levels results were supposed to have been released on March 7, 2018. During the validation process, the results received did not align with the organizational structure, as there were more respondents than employees in most branches, and less respondents than expected in the regions. This issue was similar to what was seen in past years, and it was raised at the National Steering Committee meetings as well as with TBS. While similar issues were encountered in previous surveys, Statistics Canada, as the previous service provider, was able to recode the data to ensure validity of organizational unit level results based on the provisions found within the Statistics Act. While the situation is unfortunate, as we know survey results are best addressed at the local level, this problem in no way impacts the validity of the 2018 PSES data at the Agency level. Furthermore, in addition to using Agency level results, additional analyses can be leveraged to measure the impact of our HR strategies and inform the development of new strategies as required. For instance, we are able to break down Agency level results by occupational group, such as SP and MG.

The PSES champion mentioned a few results such as 12% of employees indicated to have been subject to harassment and 56% are satisfied with the way harassment issues are resolved, compared to 58% for 2017. He also pointed to high levels employee satisfaction where 85% of employees believe that the CRA implements activities and practices that support a diverse workplace and over 75% think we are successful in increasing awareness of mental health. There are a few areas where additional attention is required including the resolution of interpersonal issues, initiating formal recourse, and managing unsatisfactory performance. Further analysis will be conducted to understand and better interpret these results. He also stated that we would continue to work closely with TBS to put new measures in place to ensure the CRA receives meaningful results at the organizational unit level for 2019 PSES and beyond.

The UTE First Vice-President was pleased to see the survey happening every year instead of every three years. The PSES champion mentioned it would be important that the union have a back-up to attend the meetings in case of absence.

Action Item:

- UTE will provide a back-up representative to attend the PSES Steering Committee meetings in case of absence.

Discrimination and Harassment Centre of Expertise

The AC, HRB said that the work is continuing in collaboration with Public Affairs Branch on the development of a communication plan to strengthen the workplace wellness, diversity and inclusion dialogue. He also mentioned the email that was shared on March 13, 2019, from the Commissioner and the Deputy Commissioner, asking support to foster a culture of trust, respect and inclusion, and to continue the dialogue on wellness. The purpose of this email was to educate employees about their responsibilities and to remind them of the services and resources available if they are experiencing discrimination or harassment in the workplace. After a consultation with both unions in September 2018, they were informed in December that the support tools for a workplace free of discrimination and harassment were approved, which included improvements to the resolution process and the forms and the development of a new template letter on workplace recovery. Process maps have been updated, to clarify roles and responsibilities in the resolution process, to reflect the current context. Additional work is pending the thorough review of the regulations related to the changes to the Canada Labour Code. Consultation will take place once these are finalized and changes are integrated into the process. The case management system for monitoring and reporting on discrimination and harassment complaints and grievances was launched April 1, 2019.

The AC, HRB also gave an update on the Prairie Pilot. He stated that the CRA's Discrimination and Harassment Centre of Expertise (DHCE) is working on a prevention approach aimed at creating ongoing dialogue about discrimination and harassment. Engagement of leadership at all levels is the first component which was launched in September 2018 and cascaded from the regional management team to team leaders. By the end of June 2019, 150 sessions with 712 executives, managers and team leaders were completed. The second component is the delivery of awareness sessions to all employees that are co-facilitated by management and union representatives. Finally, the third component is to measure activities and outcomes of a healthy and respectful workplace.

In February 2019, both unions were provided with an update on the Clerk's report on Safe Workspaces. The Agency Tiger Team was created to brainstorm innovative ideas and a Working Group of subject matter experts was established to examine CRA's approach to addressing discrimination and harassment.

Both unions were also consulted in February 2019 on CRA's draft response to the Clerk's report on Safe Workspaces. The AC, HRB also mentioned that a positive meeting took place between UTE and the Workplace Relations and Compensation Directorate to continue the dialogue on discrimination and harassment.

The UTE First National Vice-President understands the meetings are on hold due to Bill C-65 and he is looking forward hearing about the role of the DHCE.

Staffing Redesign and Term Employee Conversion

The Quebec Regional Vice-President expressed concerns and frustration with the lack of support by management concerning the recommendations that were made by the Committee.

The Commissioner mentioned that following the meeting with the UTE National President in May, they are looking at the three main issues that were discussed and a response will be shared soon.

The AC, HRB stated that from all of the recommendations made, the Human Resources Committee approved the recommendation to research the five year term roll-over.

The UTE National President is pleased that CRA is looking at the three year term conversion. The response received will shape the reaction of the members.

Federal Budget 2019

The Commissioner stated that due to time restraint, we would be sending a summary of the legislative highlights by email.

Action Item:

- The Director, Legislative Policy and Regulatory Affairs Branch (LPRAB) will be sending UTE a summary of the 2019 Federal Budget.

Annual Resource Alignment Process

The Assistant Commissioner, Finance and Administration Branch (AC, FAB) mentioned that the CRA is now undertaking its second Annual Resource Alignment Process (ARAP) in 2019.

Initially ARAP was launched in 2017, to ensure that budget allocations aligned with both Government of Canada and Agency priorities.

While ARAP was intended to be an annual exercise, it did not take place in 2018 due to the Comprehensive Review that was announced in Budget 2018. The CRA is now undertaking its second ARAP in 2019. This year's objective will be similar to the first exercise as it will examine resources to make sure they are allocated to Agency's highest priorities and ensure that they are delivered in the most effective manner. The Agency will be well positioned to determine what reallocations are required.

Closing Remarks

The Commissioner appreciated the frank discussions and thanked the parties for their participation. He reminded the participants that the next meeting is scheduled on December 5, 2019.

The UTE National President thanked management for these open and frank discussions and welcomed everyone to the December meeting at the new venue.



Bob Hamilton
Commissioner
Canada Revenue Agency

Date: NOV 08 2019



Marc Brière
National President
Union of Taxation Employees

Date: