

## RESEARCH SYMPOSIUM

### Overcoming barriers to tax filing for people with low incomes

8:30 am – 5:00 pm, Thursday, February 7, 2019

Ottawa Conference and Event Centre, 200 Coventry Rd., Ottawa

AGENDA	
<b>8:30 am</b>	<b>Registration and light refreshments</b>
<b>9:00 am</b>	<b>Opening remarks</b> Jeff Cates, President and CEO, Intuit Canada
<b>9:15 am</b>	<b>Setting the context: Why tax filing matters</b> Liz Mulholland, CEO, Prosper Canada
<b>9:30 am</b>	<b>Barriers to tax filing experienced by people with low incomes</b> New research insights on tax filing experiences and attitudes among people with low incomes in Canada. Presentations followed by Q&A and table discussion. <ul style="list-style-type: none"> <li>• <b>Income tax filing and benefits take-up: Challenges and opportunities for Canadians living on low income</b>, Uttam Bajwa, Project Lead, Global Health and Research Associate, Dalla Lana School of Public Health, University of Toronto</li> <li>• <b>Tax time insights</b>, Nirupa Varatharasan, Research and Evaluation Officer, Prosper Canada</li> <li>• <b>“Stories from the field”: Contextualizing the barriers Indigenous People face</b>, Erin Jeffrey, Outreach Officer, Canada Revenue Agency (CRA)</li> </ul>
<b>10:30 am</b>	<b>Break</b>
<b>10:50 am</b>	<b>Closing the tax-filing gap: Challenges and opportunities</b> Presentation of findings from research on the challenges and limitations of current tax filing and benefit assistance programs and ways these can be strengthened. Presentations followed by Q&A and table discussion. <ul style="list-style-type: none"> <li>• <b>Community Volunteer Income Tax Program</b>, Nancy McKenna, Manager, CVITP, Canada Revenue Agency</li> <li>• <b>Supporting organizations in the CVITP</b>, Aaron Kozak, Policy Analyst, Employment and Social Development Canada and Melissa Valencia, Acting Programs Officer, CRA</li> <li>• <b>A Realist analysis of nonprofit tax filing services</b>, Kevin Schachter, Graduate Student, University of Manitoba and Information Manager, SEED Winnipeg</li> <li>• <b>Providing tax filing and benefits assistance in Indigenous communities</b> Simon Brascoupé, Vice President, Education and Training, AFOA Canada</li> </ul>

<b>12:00 pm</b>	<b>Lunch</b>
<b>1:00 pm</b>	<p><b>Opportunities for action</b> Facilitated exploration of collaboration and coordination opportunities to improve our understanding of the barriers at an individual, organizational and systemic level.</p>
<b>1:30 pm</b>	<p><b>National and regional strategies to boost tax filing</b> Panel discussion followed by Q&amp;A and table discussion.</p> <ul style="list-style-type: none"> <li>• <b>Community Volunteer Income Tax Program</b>, Nancy McKenna, Manager, CVITP, Canada Revenue Agency</li> <li>• <b>GetYourBenefits! Diagnose and Treat Poverty</b> Dr. Noralou Roos, Co-Director, GetYourBenefits! and Professor, Manitoba Centre for Health Policy</li> <li>• <b>Get your piece of the money pie</b>, Althea Arsenault, Manager of Resource Development, NB Economic and Social Inclusion Corporation</li> </ul>
<b>2:30 pm</b>	<b>Break</b>
<b>2:45 pm</b>	<p><b>Innovations in tax filing assistance</b> Speakers will discuss innovations they're exploring to expand the reach and impact of tax filing and benefit supports, followed by Q&amp;A and table discussion.</p> <ul style="list-style-type: none"> <li>• <b>Scaling tax filing assistance</b>, John Silver, Executive Director, Community Financial Counselling Service (CFCS), Winnipeg</li> <li>• <b>Virtual Tax Filing Pilot</b>, Rada Cherkaoui, Senior Product Manager and Innovation Catalyst, Intuit Canada and Steve Vanderherberg, Director-Strategic Initiatives, WoodGreen Community Services</li> <li>• <b>Innovative use of technology for VITA</b>, German Tejada, National Director-Financial Programs, Single Stop USA</li> </ul>
<b>3:45 pm</b>	<p><b>Opportunities for action using innovation methodologies</b> Breaking down the barriers through a facilitated brainstorming session.</p>
<b>4:45 pm</b>	<p><b>Closing remarks</b> Liz Mulholland, CEO, Prosper Canada</p>
<b>5:00 pm</b>	<b>Adjournment</b>