

Ringma, Shalegh FIN:EX

From: Arnsdorf, Carmen FIN:EX
Sent: February 8, 2019 5:39 PM
To: Ngo, Dawn FIN:EX
Subject: s.12

Hello Dawn,

Short Summary (All items):

s.12,s.13

We did not prepare a Q&A for the Minister on SVT/EHT but they've been rolled into an item called ^{s.12}
s.12

s.12

(Briefing Materials):

SVT Background / Analysis:

- Legislation for the Speculation and Vacancy Tax (SVT) was introduced on October 16, 2018 in the *Budget Measures Implementation (Speculation and Vacancy Tax) Act*. This legislation enables commitments to prevent housing speculation and help turn vacant and underutilized properties into homes for people who live and work in B.C., as established in the Minister of Finance's Mandate Letter, Budget 2018, and *Homes for BC: A 30-Point Plan for Housing Affordability in British Columbia*.

- SVT is an annual tax payable by owners of residential property in designated taxable regions of BC. More than 99% of British Columbians are estimated to be exempt from the tax and it is estimated that 32,000 owners will need to pay the tax.
- Approximately 1.6 million residential property owners in the designated taxable regions (primarily core urban communities) will have to complete an annual declaration to claim any relevant exemptions.
- If the legislation is passed in the fall session, the ability to administer the SVT would need to be in place immediately as taxation would begin December 31st, 2018.
- The Revenue Division in the Ministry of Finance (FIN) has specified the need for ^{s.12,s.13} and options for staffing dedicated positions to administer the SVT, including compliance, auditing and collection services, and funding to cover costs related to the mail-out of 1.6 million declaration letters, the Service BC Contact Centre contract, and any public information campaigns to ensure compliance and timelines are met.
- s.12,s.13



EHT Background / Analysis:

- Budget 2018 announced a new revenue source, the Employer Health Tax (EHT). The purpose of the EHT is to allow for the full elimination of Medical Services Plan premiums.
- The EHT is to take effect on January 1, 2019. Pending royal assent, the Ministry of Finance, Revenue Division will be responsible for the administration of EHT, including education and communication, registration of taxpayers, processing of returns, the administration of tax filings, compliance activities, and the collection of outstanding amounts as well as the appeal process.
- s.12,s.13



- In 2018/19 members of ITB were deployed to work with an external vendor with the system configuration required to administer the tax program
- s.12,s.13



Thanks,

Carmen Arnsdorf

Treasury Board Analyst

Performance Budgeting Office, Treasury Board Staff

Ministry of Finance, Province of British Columbia

E: Carmen.Arnsdorf@gov.bc.ca | T: 778-698-5898 | C: 250-514-4202

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Ministry: Finance

s.12,s.13

Issue: Speculation and Vacancy Tax (SVT) Administration
s.12,s.13

Background / Analysis:

- Legislation for the Speculation and Vacancy Tax (SVT) was introduced on October 16, 2018 in the *Budget Measures Implementation (Speculation and Vacancy Tax) Act*. This legislation enables commitments to prevent housing speculation and help turn vacant and underutilized properties into homes for people who live and work in B.C., as established in the Minister of Finance's Mandate Letter, Budget 2018, and *Homes for BC: A 30-Point Plan for Housing Affordability in British Columbia*.
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- Approximately 1.6 million residential property owners in the designated taxable regions (primarily core urban communities) will have to complete an annual declaration to claim any relevant exemptions.
- If the legislation is passed in the fall session, the ability to administer the SVT would need to be in place immediately as taxation would begin December 31st, 2018.
- The Revenue Division in the Ministry of Finance (FIN) has specified the need for s.12,s.13 and options for staffing dedicated positions to administer the SVT, including compliance, auditing and collection services, and funding to cover costs related to the mail-out of 1.6 million declaration letters, the Service BC Contact Centre contract, and any public information campaigns to ensure compliance and timelines are met.
- s.12,s.13

➤

s.12,s.13

Page 05

Withheld pursuant to/removed as

s.12;s.13

TBS Budget 2019 Briefing Note

s.12,s.13

Date: November 30, 2018

Analyst: Carmen Arnsdorf

Decision: Approved by the Chair of Treasury Board on December 4th 2018.

Confidential – for the advice and decision of Treasury Board, Chair, and Secretary

Page 3

From: Mann, Dawn FIN:EX
To: Saito, Osami FIN:EX
Cc: Davies, Ann FIN:EX
Subject: FW: FIN Estimate for costs to date
Date: February 14, 2019 4:42:00 PM
Importance: High

Hi Osami,

As discussed, we are still waiting for information on costs up to the end of March – these are up to February only.

Thanks for your patience,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Bell, Russell CITZ:EX
Sent: Wednesday, February 13, 2019 3:34 PM
To: Mann, Dawn FIN:EX
Cc: Eason, Jeannette CITZ:EX ; Duncan, Peggy CITZ:EX ; Hinshaw, Ron CITZ:EX
Subject: FIN Estimate for costs to date
Importance: High

Dawn,

I just received *an estimate* for costs to date.

I do not have fuller details of each items but I am happy to forward any questions.

Maximus has *estimated incremental cost* to the end of February is roughly \$790,000 - \$1,020,000.

This is comprised of:

- ~\$700 – 900K for agent labour due to the much higher volumes and handle time
- ~\$30 – 60K for additional seats implemented specifically for spec tax (capital and ongoing costs for 5 months) and additional s.15 (phone lines) to handle to volume of incoming calls and transfers back to Finance.
- ~\$60K to date for additional one time IT and operational support effort to make the “on the fly changes” to the platform, seats, lines, queues, transfer protocols, etc.

Key assumptions and comments:

- This accounts for the increased volume to date and a projected volume through the end of February.
- This estimate does not include March – June. SBC and Maximus are working on statistical models to produce this.
- Maximus has asked that I stress this is a rough estimate only, and is almost guaranteed to change. It is highly dependent on the volume and handle time that materializes over the rest of the time frame from now to end of June 2019.

Cheers

RB

Russell Bell
A/Director, Contact Centres
Service BC
Ministry of Citizens' Services
T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

"Access to government services made easy"



Where ideas work

2018

10 Best Places to Work

From: [Goss, Jordan T FIN:EX](#)
To: [Mann, Dawn FIN:EX](#)
Cc: [Davies, Ann FIN:EX](#); [Emery, Steven B FIN:EX](#)
Subject: Re: FIN Estimate for costs to date
Date: February 13, 2019 8:27:10 PM

We mentioned it on the call today and Russell knows we need the info up to the end of March so he will keep trying.

Jordan Goss
Ministry of Finance
250 387-0665

On Feb 13, 2019, at 5:48 PM, Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca> wrote:

Hi Ann,

I'm not sure how best to proceed given they are still working on the model and the deadline for our forecast has passed.

The numbers below represent a good portion of Q4 and I would expect volumes will decrease somewhat in March. If Steven can provide some thoughts on what March activity would look like Osami could apply an percentage to the number below and push it along until we get something better.

I would still have Jordan escalate this as a priority at her level given the challenges we have seen to date.

Dawn Mann

Manager, Divisional Projects
Tel: 250.356.6250

From: Davies, Ann FIN:EX

Sent: Wednesday, February 13, 2019 4:53 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>; Goss, Jordan T FIN:EX <Jordan.Goss@gov.bc.ca>

Cc: Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>

Subject: RE: FIN Estimate for costs to date

I am OK with sharing with Osami.

I guess what we wanted is a forecast to the end of March so that we capture what we need for this fiscal – and then beyond. Could we find out when we might get the March – June numbers?

C. Ann Davies

Executive Director
Tel: 778.698.4800 | Cell: 250.818.3966

From: Mann, Dawn FIN:EX

Sent: February 13, 2019 4:45 PM

To: Goss, Jordan T FIN:EX <Jordan.Goss@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>

Subject: FW: FIN Estimate for costs to date

Importance: High

Hi both,

We have received the financials from Maximus! Would you like me to pass this along to Osami?

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Bell, Russell CITZ:EX

Sent: Wednesday, February 13, 2019 3:34 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>

Cc: Eason, Jeannette CITZ:EX <Jeannette.Eason@gov.bc.ca>; Duncan, Peggy CITZ:EX <Peggy.Duncan@gov.bc.ca>; Hinshaw, Ron CITZ:EX <Ron.Hinshaw@gov.bc.ca>

Subject: FIN Estimate for costs to date

Importance: High

Dawn,

I just received *an estimate* for costs to date.

I do not have fuller details of each items but I am happy to forward any questions.

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Key assumptions and comments:

- This accounts for the increased volume to date and a projected volume through the end of February.
- This estimate does not include March – June. SBC and Maximus are working on statistical models to produce this.
- Maximus has asked that I stress this is a rough estimate only, and is almost guaranteed to change. It is highly dependent on the volume and handle time that materializes over the rest of the time frame from now to end of June 2019.

Cheers

RB

Russell Bell

A/Director, Contact Centres

Service BC

Ministry of Citizens' Services

T: 250 952 6854 | M: 250-507-9572 | Web: <http://www.servicebc.gov.bc.ca>

“Access to government services made easy”

From: [Mann, Dawn FIN:EX](#)
To: [Saito, Osami FIN:EX](#)
Cc: [Yee, Stephanie FIN:EX](#); [Davies, Ann FIN:EX](#); [Nijjar, Aman FIN:EX](#); [Emery, Steven B FIN:EX](#); [Duncan, Peggy CITZ:EX](#)
Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model
Date: December 20, 2018 8:42:00 AM

Hi Osami,

I have been advised by Peggy Duncan at Service BC that we do not need to pay PST for Phase I or Phase II as they are service contracts.

If you require further insight into the process for managing these financial agreements, I can follow up with Peggy and connect you with their financial manager.

Thanks,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Saito, Osami FIN:EX

Sent: Wednesday, December 19, 2018 2:25 PM

To: Mann, Dawn FIN:EX

Cc: Yee, Stephanie FIN:EX ; Davies, Ann FIN:EX ; Nijjar, Aman FIN:EX ; Emery, Steven B FIN:EX

Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model

Hi Dawn,

Would you please confirm if we need to pay PST for Phase I as well as Phase II? I need this information by January 8th.

Thanks!

Osami

From: Mann, Dawn FIN:EX

Sent: December 12, 2018 5:17 PM

To: Saito, Osami FIN:EX <Osami.Saito@gov.bc.ca>

Cc: Yee, Stephanie FIN:EX <Stephanie.Yee@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>; Nijjar, Aman FIN:EX <Aman.Nijjar@gov.bc.ca>; Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>

Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model

Hi Osami,

The payment schedule for Phase I (October 1st to December 31st) is below – provided on September 28, 2018.

Payment Amount	Due Date
\$6,573.66	October 31, 2018
\$6,573.66	November 30, 2018
\$6,573.66	December 31, 2018

I'm not sure how you have handled PST on previous contracts – this is a service contract so I'm unclear if it's required. This payment is also to Service BC so I don't believe it would apply in this regard either.

Happy to connect tomorrow to discuss further,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Saito, Osami FIN:EX

Sent: Wednesday, December 12, 2018 4:38 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>

Cc: Yee, Stephanie FIN:EX <Stephanie.Yee@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>;

Nijjar, Aman FIN:EX <Aman.Nijjar@gov.bc.ca>; Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>

Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model

Thanks for the confirmation, Dawn.

How much should I include for Phase I for SVT? Also, should I add 7% for PST to the amount you gave me?

Osami

From: Mann, Dawn FIN:EX

Sent: December 12, 2018 4:33 PM

To: Saito, Osami FIN:EX <Osami.Saito@gov.bc.ca>

Cc: Yee, Stephanie FIN:EX <Stephanie.Yee@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>;

Nijjar, Aman FIN:EX <Aman.Nijjar@gov.bc.ca>; Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>

Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model

Good afternoon Osami,

I can confirm the following:

1. The cost model below is for Phase II only and is a discreet agreement, separate from Phase I which ends December 31, 2018. Phase I did not include transition fees so they have been loaded into this model.
2. No based on the response below.
3. This contract does not include PST.

Please let me know if you have any further questions,

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Saito, Osami FIN:EX

Sent: Wednesday, December 12, 2018 3:15 PM

To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>

Cc: Yee, Stephanie FIN:EX <Stephanie.Yee@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>;

Nijjar, Aman FIN:EX <Aman.Nijjar@gov.bc.ca>; Emery, Steven B FIN:EX <Steven.Emery@gov.bc.ca>

Subject: RE: Update: Speculation and Vacancy Tax - Phase II Cost Model

Hi Dawn,

Thank you for the information. I would like to confirm the following:

1. Would you please confirm that \$805K includes both Phase I and Phase II?
2. If so, is Phase I 's cost \$31,241.80 (\$805K less \$257,934K*3)?
3. Does this contract include PST?

Please let me know by Friday (our Q3 Nov forecast deadline).

Thank you!

Osami

From: Mann, Dawn FIN:EX

Sent: December 11, 2018 12:19 PM

To: Saito, Osami FIN:EX <Osami.Saito@gov.bc.ca>

Cc: Yee, Stephanie FIN:EX <Stephanie.Yee@gov.bc.ca>; Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>

Subject: Update: Speculation and Vacancy Tax - Phase II Cost Model

Good afternoon,

We have finalized the Phase II agreement with SBC for the expansion of services with the Contact Centre for the new Speculation and Vacancy tax.^{s.13}

s.13

The total cost is provided below, as well as the payment schedule set out by the agreement.

Speculation Tax					
Province Fiscal Year Summary	18/19	19/20	20/21	21/22	Total
Total Price	805,045	484,627	0	0	1,289,672

Payments are to be made by the Province in five equal payments of \$257,934.40 per month (January 2019 to May 2019).

s.13

s.13

- let's discuss with

Ann regarding approach.

Let me know if you have any questions,

Dawn Mann

Manager, Divisional Projects

Public Information and Corporate Services Branch

Ministry of Finance | Revenue Division

Tel: 250.356.6250 | Cell: 250.882.4583

Website: [Revenue Division Website](#)



Where ideas work



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From: [Duncan, Peggy CITZ:EX](#)
To: [Mann, Dawn FIN:EX](#)
Subject: RE: Updated SVT Agreement
Date: December 12, 2018 2:25:13 PM

Hi Dawn,

Yes the monthly payment schedule changed to reflect the transition costs that were on the original Economic Model. Sorry we missed capturing these on the first agreement.

Please let me know if I can be of further assistance.

Peggy

From: Mann, Dawn FIN:EX
Sent: December 7, 2018 9:50 AM
To: Duncan, Peggy CITZ:EX
Subject: RE: Updated SVT Agreement

Hi Peggy,

I see the monthly payments changed as a result as well – the transition fees weren't considered in the payment schedule either?

I will review with Ann today and have this back to you as soon as I can.

Dawn Mann

Manager, Divisional Projects

Tel: 250.356.6250

From: Duncan, Peggy CITZ:EX
Sent: Thursday, December 6, 2018 1:01 PM
To: Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Subject: Updated SVT Agreement

Hi Dawn,

Here is the updated agreement ready for Ann's signature; Phase II starts on Page 14. Please note the Financial Model and hours of operation have been updated.

Please let me know if you have any questions or concerns.

Cheers,

Peggy

Peggy Duncan BA, MBA
Director, Service Design and Integration
Service BC

Ministry of Citizens' Services

T: 778-698-2060 | C: 250-886-1589 | Web: <http://www.servicebc.gov.bc.ca>

"Access to government services made easy"

From: Mann, Dawn FIN:EX
To: Goss, Jordan T FIN:EX; Davies, Ann FIN:EX
Subject: RE: What was the contract with Maximus worth
Date: February 6, 2019 2:33:00 PM

Hi Jordan,

The current agreement (Appendix II), covering from January 2nd to May 31st is for \$1,289,672.

I have requested an estimate for OT from SBC and hope to have that this week.

Dawn Mann
Manager, Divisional Projects
Tel: 250.356.6250

-----Original Message-----

From: Goss, Jordan T FIN:EX
Sent: Wednesday, February 6, 2019 2:08 PM
To: Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>; Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Subject: What was the contract with Maximus worth

Before all this ot and extra hiring.

Jordan Goss
Ministry of Finance
250 387-0665

From: [Mann, Dawn FIN:EX](#)
To: [Davies, Ann FIN:EX](#)
Cc: [Goss, Jordan T FIN:EX](#)
Subject: RE: What was the contract with Maximus worth
Date: February 6, 2019 2:43:00 PM

October 1st to December 31st - \$20,325

-----Original Message-----

From: Davies, Ann FIN:EX
Sent: Wednesday, February 6, 2019 2:15 PM
To: Goss, Jordan T FIN:EX <Jordan.Goss@gov.bc.ca>; Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Subject: RE: What was the contract with Maximus worth

The one for Oct - Dec 2018 was just under \$20K for the three months and the most recent is \$1.3M.

I can get you the actual number if you want accurate?

C. Ann Davies
Executive Director
Tel: 778.698.4800 | Cell: 250.818.3966

-----Original Message-----

From: Goss, Jordan T FIN:EX
Sent: February 6, 2019 2:08 PM
To: Davies, Ann FIN:EX <Ann.Davies@gov.bc.ca>; Mann, Dawn FIN:EX <Dawn.Mann@gov.bc.ca>
Subject: What was the contract with Maximus worth

Before all this ot and extra hiring.

Jordan Goss
Ministry of Finance
250 387-0665

From: [Davies, Ann FIN:EX](#)
To: [Saito, Osami FIN:EX](#); [Nijjar, Aman FIN:EX](#); [Yee, Stephanie FIN:EX](#)
Subject: FW: s.12
Date: March 5, 2019 10:57:41 AM
Attachments: s.12
Importance: High

Here you go....

C. Ann Davies

Executive Director

Tel: 778.698.4800 | Cell: 250.818.3966

From: Emery, Steven B FIN:EX

Sent: March 5, 2019 10:39 AM

To: Davies, Ann FIN:EX

Subject: FW: s.12

Importance: High

s.12

Sorry for the delay. Thanks!

Steven Emery

Executive Director, Property Taxation Branch

From: Emery, Steven B FIN:EX

Sent: November 16, 2018 9:26 AM

To: Dicks, Erin L FIN:EX <Erin.Dicks@gov.bc.ca>

Cc: Ngo, Dawn FIN:EX <Dawn.Ngo@gov.bc.ca>

Subject: FW:s.12

Importance: High

Hi Erin. Looks great. Thanks! I made a few edits to the submission. I tracked changes so you can see.

Feel free to accept or reject. Just small edits.

Otherwise, looks great! Thanks so much.

Steven Emery

Executive Director, Property Taxation Branch

From: Dicks, Erin L FIN:EX

Sent: Thursday, November 15, 2018 3:49 PM

To: Emery, Steven B FIN:EX

Cc: Ngo, Dawn FIN:EX

Subject: s.12

Importance: High

Hi Steven... my apologies for the delay. Things are really hopping in Budgets! I've attached
s.12,s.13

s.12,s.13

If you have any questions or changes please let me know
by the 4:00 pm tomorrow (Friday) at the latest. At that point I will be forwarding on to our TB
analyst.

Thanks!

Erin Dicks

Budget Manager • Financial Planning and Budgets • Ministry of Finance

Phone: (778) 698-8587 • Fax: (250) 356-7326 • 3rd Fl – 617 Government St, Victoria BC V8W 9V1

Page 18 to/à Page 22

Withheld pursuant to/removed as

s.12;s.13

Page 23

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s.12;s.15;s.13

Page 24 to/à Page 25

Withheld pursuant to/removed as

s.12;s.13

Fiscal 2019/2020 Estimates Budget

Branch	PTB	CTPB	CSD	SVT Estimates Budget Total	RD Total	s.12	Comments	Additional Costs	Comments
STOB	022.32197.34276	022.32193.34272	022.32014.34050						
50EA	954,000.00	431,000.00	313,000.00	1,698,000.00	1,385,000.00		27 FTE (4 CSD)		
51A							Professional Dues		
5298	236,000.00	107,000.00	78,000.00	421,000.00	421,000.00		24.8% Benefits		
57EA	10,000.00			10,000.00	10,000.00		Travel		
5901	100,000.00			100,000.00	100,000.00		Legal Services		
60EA	1,500,000.00			1,500,000.00	1,500,000.00		Service BC Contact Centre (Maximus)	TBD	Contract w/ CRA
63EA	50,000.00			50,000.00	50,000.00		Information Systems		
65EA	2,333,000.00			2,333,000.00	2,333,000.00		1.6 million letters (paper, stamps)		
							Training (part of FAST contract)		
67EA	500,000.00			500,000.00	500,000.00		Marketing/Public Campaigns		
73EA	1,822,000.00			1,822,000.00	1,822,000.00		System Amortization		
	7,505,000.00	538,000.00	391,000.00	8,434,000.00	8,121,000.00			-	

Fiscal 2020/2021 Estimates Budget

Branch	PTB	CTPB	CSD	SVT Estimates Budget Total	RD Total	s.12	Comments	Additional Costs	Comments
STOB	022.32197.34276	022.32193.34272	022.32014.34050						
50EA	969,000.00	431,000.00	313,000.00	1,713,000.00	1,400,000.00		27 FTE (4 CSD)		
51EA				-	-		Professional Dues		
5298	240,000.00	107,000.00	78,000.00	425,000.00	347,000.00		24.8% Benefits		
57EA	10,000.00			10,000.00	10,000.00		Travel		
5901	100,000.00			100,000.00	100,000.00		Legal Services		
60EA	1,500,000.00			1,500,000.00	1,500,000.00		Service BC Contact Centre (Maximus)		
63EA	50,000.00			50,000.00	50,000.00		Information Systems		
65EA	2,012,000.00			2,012,000.00	2,012,000.00		1.6 million letters (paper, stamps)		
67EA	500,000.00			500,000.00	500,000.00		Marketing/Public Campaigns		
73EA	1,944,000.00			1,944,000.00	1,944,000.00		System Amortization		
	7,325,000.00	538,000.00	391,000.00	8,254,000.00	7,863,000.00			-	

FISCAL 2018/19 FORECAST

Branch: 34276 Property Taxation

Speculation Tax

Forecast Month: January

STOB	Description	Budget 2018/19 (A)	YTD Expenditures (B)	Updated Forecast to Year End (C)	Under / (Over) Working Budget D = (A - C)	Column D Variance Explained in Note #	Previous Month Forecast (E)	Increase / (Decrease) From Previous Forecast F = (C - E)	Column F Variance Explained in Note #	2017/18 Actuals
50	Salaries and Overtime		218,638	807,129	(807,129)		509,057	298,073		
51	Supplementary Salary Costs		1,122	2,500	(2,500)		1,000	1,500		
52	Employee Benefits		54,222	200,168	(200,168)		126,246	73,922		
54	Legislative Salaries & Indemnities				0			0		
	Subtotal - Salaries and Benefits	0	273,982	1,009,798	(1,009,798)		636,303	373,495		0
55	Boards/Commissions/Courts Fees & Exp				0			0		
57	Travel		1,620	2,000	(2,000)		2,000	0		
5901	Legal Services		1,115	20,000	(20,000)		20,000	0		
5935	Corporate Services Secretariat				0			0		
5936	IGRS Conference Fees				0			0		
60	Prof. Services - Operational & Regulatory		749,000	4,894,523	(4,894,523)		824,766	4,069,757	60b	
61	Prof. Services - Advisory		81,322	58,000	(58,000)		58,000	0	61b	
63	Information Systems - Operating		0	184,500	(184,500)			184,500	63b	
65	Office & Business Expenses		125,461	2,732,285	(2,732,285)		2,732,285	0	65b	
67	Informational Advert & Publications		729	4,000	(4,000)		4,000	0		
68	Statutory Advertising & Publications				0			0		
69	Utilities, Materials, & Supplies				0			0		
70	Operating Equip. & Vehicles				0			0		
73	Amortization Expense			363,405	(363,405)		363,405	0		
74	Gain-Loss on Cap Asset Disposal				0			0		
75	Building Occupancy Charges				0			0		
	Subtotal - Operating Costs	0	959,246	8,258,713	(8,258,713)		4,004,456	4,254,257		0
77	Grants				0			0		
79	Entitlements				0			0		
80	Transfers under Agreement				0			0		
	Subtotal - Government Transfers	0	0	0	0		0	0		0
82	Legislative Assembly				0			0		
84	Interest Costs - Non Public Debt				0			0		
85	Other Expenses				0			0		
	Subtotal - Other Expenses	0	0	0	0		0	0		0
	Total Before Recoveries	0	1,233,229	9,268,511	(9,268,511)		4,640,759	4,627,752		0
8805	Employee Benefits Recovered		0		0			0		
8807	Salary Costs Recovered		0		0			0		
8809	Operating Costs Recovered		0		0			0		
8822	Claims Expense Recovered		0		0			0		
8824	Program Administration Recovered		0		0			0		
8859	Centralized Mgmt Support Serv Recovered		0		0			0		
8885	Other Costs Recovered		0		0			0		
	Subtotal - Recoveries within CRF	0	0	0	0		0	0		0
89	Recoveries within GRE		0		0			0		
9001	Rec-Social Serv Tax				0			0		
9002	Rec-Fees and Licenses				0			0		
9003	Rec-Other Misc Revenues				0			0		
9004	Rec-Contr from Federal Govt				0			0		
9005	Rec-Gaming Revenue Transfers				0			0		
9007	Rec-Fiscal Agency Loans				0			0		
9008	Rec-Medical Services Plan Fees				0			0		
9009	Recoveries-Other				0			0		
	Subtotal - Recoveries External to the GRE	0	0	0	0		0	0		0
	Total Recoveries	0	0	0	0		0	0		0
	Net Total	0	1,233,229	9,268,511	(9,268,511)		4,640,759	4,627,752		0

50 11 FTEs

50b Jan. - Estimated \$345K OT for Q4 added

51 1 CPA now

60 Jan. STOB60 contracts for SVT includes:
 Maximus Service BC contract 2,394,524.00 Phase I and Phase II (incl. additional in Q4) - March amount not yet confirmed, but the estimated amount of \$510K included.
 ESIT contract 2,480,000.00 Incl. CBV (confirmed with David S. -)
 TransUnion 20,000.00
 NOFA/SOFA ??? Kally to check with Bernice Nix. (Feb. 21, 2019)
 CRA contract (data) ??? Next fiscal

60b Increase due to additional Q4 costs for Maximus contract

63b SVT - ICE incremental costs per email from Rick on Feb.19, 2019

61 Spec Tax Financial Risk and Control Review - per Dawn Ngo on Sept. 11, 2018 and confirmed again on Feb. 21, 2019

65 STOB6516 Training:
 FY18/19 \$700K Q3
 FY19/20 \$300K Q2
 PST @ 7% of \$700K training in FAST contract \$49K for this fiscal

65 Printing and Postage:
 STOB6505 Printing/Postage:
 \$1,936,998 2 inserts/3 imgs this option was used.
 \$2,029,571 3 inserts/ 4imgs
 \$1,983,285 avg - approx. \$2M

Sum of Actual Amount		Column Labels								
		Jan	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
Row Labels										
EB50		40,714.72			6,099.16	57,365.43	37,129.78	38,678.01	38,650.61	218,637.71
EB51		208.77				303.86	201.06	207.38	201.41	1,122.48
EB52		10,097.25			1,512.60	14,226.61	9,208.19	9,592.14	9,585.34	54,222.13
EB57			42.82		1,577.20					1,620.02
EB59						1,115.10		-		1,115.10
EB60									749,000.00	749,000.00
EB61		18,407.69	4,650.00				5,625.00	12,623.80	40,015.29	81,321.78
EB63	-	478,575.00		-	20,895.00	428,000.00	- 428,000.00	457,680.00	-	-
EB65		125,460.67								125,460.67
EB67		728.65								728.65
Grand Total	-	282,957.25	4,692.82	-	30,083.96	501,011.00	- 375,835.97	518,781.33	837,452.65	1,233,228.54

Sum of Actual Amount	Column Labels							
Row Labels	Jan	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
EB59				1,115.10		-		1,115.10
EB60	374,500.00			107,000.00		- 100,000.00		381,500.00
EB61	12,253.19				5,750.00	12,630.62	6,245.28	36,879.09
EB63	- 25,445.00	-	-	-	-		-	- 25,445.00
EB65					2,835.50	100,000.00		102,835.50
Grand Total	361,308.19	-	-	108,115.10	8,585.50	12,630.62	6,245.28	496,884.69

Page 31 to/à Page 32

Withheld pursuant to/removed as

s.12;s.13

STOB (Multiple Items)

Sum of Amount		Column Labels							
Row Labels	2018-04-14	2018-04-28	2018-05-12	2018-05-26	2018-06-09	2018-06-23	2018-07-07	2018-07-21	Grand Total
00082040	1,776.10	1,776.10	1,776.10	1,689.39	1,627.29	1,715.40	1,676.90	1,676.89	13,714.17
Hinners,Silkca	1,776.10	1,776.10	1,776.10	1,689.39	1,627.29	1,715.40	1,676.90	1,676.89	13,714.17
00090478	1,681.97	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	14,114.67
Aikins,Jane	1,681.97	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	14,114.67
00118205					1,082.41	2,164.82	2,118.12	2,164.82	7,530.17
Limoges-Bourgaut,Alexandre					1,082.41	2,164.82	2,118.12	2,164.82	7,530.17
00118396							1,219.96	3,049.58	4,269.54
Hardy,Donald							1,219.96	3,049.58	4,269.54
00118827			1,788.50	2,044.51	2,044.51	2,044.51	2,044.51	2,044.51	12,011.05
Wahlstrom,Janice			1,788.50	2,044.51	2,044.51	2,044.51	2,044.51	2,044.51	12,011.05
00118828			2,030.95	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	13,314.00
Luong,Thuy Diem			2,030.95	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	13,314.00
00118829				2,302.48	2,164.82	2,164.82	2,164.82	2,164.82	10,961.76
McLaughlin,Heather				2,302.48	2,164.82	2,164.82	2,164.82	2,164.82	10,961.76
00118830					2,394.25	2,164.82	2,164.82	2,164.82	8,888.71
Roberts,Kacy Lyn					2,394.25	2,164.82	2,164.82	2,164.82	8,888.71
Grand Total	3,458.07	3,552.20	7,371.65	10,069.09	13,345.99	14,287.08	15,421.84	17,298.15	84,804.07

				7 Hrs	70Hrs	70Hrs	70Hrs	70Hrs					
Classification	Title	Pos #	Filled By	Hrly Rate	1% Increase	0.40%	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total
CLK 14R	Compliance Analyst	82040	Hinners, Silkca	25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95
CLK 14R	Compliance Analyst	90478	Aikins,Jane	25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95
FO18 R	PRT Audit Analyst	118827	Whalstrom, Janice	29.2073	0.292073	0.1168292	0.4089022	2.86	28.62	28.62	28.62	28.62	117.35
FO18 R	Financial Analyst	118828	Luong,Thuy Diem	32.2373	0.322373	0.1289492	0.4513222	3.16	31.59	31.59	31.59	31.59	129.53
FO18 R	Financial Analyst	118829	McLaughlin,Heather	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26
FO18 R	Financial Analyst	118830	Roberts,Kacy Lyn	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26
FO Tax 27R	Tax Specialist & Policy	119281	McGill, Catherine	40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30
FO TAX 24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker	40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30
FO Tax 24R	Auditors Speculation T	111766	Vacant	39.1966	0.391966	0.1567864	0.5487524	3.84	38.41	38.41	38.41	38.41	157.49
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald	42.1737	0.421737	0.1686948	0.5904318	4.13	41.33	41.33	41.33	41.33	169.45
AMDN O 24R ADMN O 21R	Research Analyst (SOP	118205	Limoges-Bourgaut,Alexandre	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26
													1,475.11
YTD Actuals (5001,5096, 5097)		\$	84,804.07										
Bi-Weekkly Amt (Jul 21pp)	\$	17,298.15											
Pay Periods Remaining		18.00	311,366.70										
Planned Hires			208,145.00										
Hrly Rate increase + ESD			1,475.11										
		\$	605,790.88										
Leave Liability (2.10%)			12,721.61										
Total Forecast		\$	618,512.49										

Paylist 022-2692
STOB (Multiple Items)

Sum of Amount	Column Labels								
Row Labels	2018-04-14	2018-04-28	2018-05-12	2018-05-26	2018-06-09	2018-06-23	2018-07-07	2018-07-21	Grand Total
00082040	1,776.10	1,776.10	1,776.10	1,689.39	1,627.29	1,715.40	1,676.90	1,676.89	13,714.17
Hinners,Silkca	1,776.10	1,776.10	1,776.10	1,689.39	1,627.29	1,715.40	1,676.90	1,676.89	13,714.17
00090478	1,681.97	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	14,114.67
Aikins,Jane	1,681.97	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	1,776.10	14,114.67
00118205					1,082.41	2,164.82	2,118.12	2,164.82	7,530.17
Limoges-Bourgaut,Alexandre					1,082.41	2,164.82	2,118.12	2,164.82	7,530.17
00118396							1,219.96	3,049.58	4,269.54
Hardy,Donald							1,219.96	3,049.58	4,269.54
00118827			1,788.50	2,044.51	2,044.51	2,044.51	2,044.51	2,044.51	12,011.05
Wahlstrom,Janice			1,788.50	2,044.51	2,044.51	2,044.51	2,044.51	2,044.51	12,011.05
00118828		2,030.95	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	13,314.00
Luong,Thuy Diem		2,030.95	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	2,256.61	13,314.00
00118829			2,302.48	2,164.82	2,164.82	2,164.82	2,164.82	2,164.82	10,961.76
McLaughlin,Heather			2,302.48	2,164.82	2,164.82	2,164.82	2,164.82	2,164.82	10,961.76
00118830				2,394.25	2,164.82	2,164.82	2,164.82	2,164.82	8,888.71
Roberts,Kacy Lyn				2,394.25	2,164.82	2,164.82	2,164.82	2,164.82	8,888.71
Grand Total	3,458.07	3,552.20	7,371.65	10,069.09	13,345.99	14,287.08	15,421.84	17,298.15	84,804.07

ESD + 1% Increase

ESD + 1% Increase								7 Hrs	70Hrs	70Hrs	70Hrs	70Hrs		
Classification	Title	Pos #	Filled By	Hrly Rate	1% Increase	0.40%	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total	
CLK 14R	Compliance Analyst	82040	Hinners, Silkca	25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95	
CLK 14R	Compliance Analyst	90478	Aikins,Jane	25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95	
FO18 R	PRT Audit Analyst	118827	Whalstrom, Janice	29.2073	0.292073	0.1168292	0.4089022	2.86	28.62	28.62	28.62	28.62	117.35	
FO18 R	Financial Analyst	118828	Luong,Thuy Diem	32.2373	0.322373	0.1289492	0.4513222	3.16	31.59	31.59	31.59	31.59	129.53	
FO18 R	Financial Analyst	118829	McLaughlin,Heather	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
FO18 R	Financial Analyst	118830	Roberts,Kacy Lyn	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
FO Tax 27R	Tax Specialist & Policy	119281	McGill, Catherine	40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30	
FO TAX 24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker	40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30	
FO Tax 24R	Auditors Speculation 1	111766	Vacant	39.1966	0.391966	0.1567864	0.5487524	3.84	38.41	38.41	38.41	38.41	157.49	
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald	42.1737	0.421737	0.1686948	0.5904318	4.13	41.33	41.33	41.33	41.33	169.45	
AMDN O 24R ADMN O 21R	Research Analyst (SOF	118205	Limoges-Bourgaut,Ale	30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
Forecast														1,475.11

Forecast		
YTD Actuals (5001,5096, 5097)	\$	84,804.07
Bi-Weekly Amt (Jul 21pp)	\$	17,298.15
Pay Periods Remaining		18.00
	\$	311,366.70
		\$ 396,170.77
Planned Hires:		
Auditors Speculation Tax Supervisor #111766		37,562.00
Tax Specialist & Policy Advisor # 119281		46,958.30
Sr. Auditors # 119171		37,561.54
		122,081.85
		518,252.62
Hrly Rate increase + ESD		1,475.11
	\$	519,727.73
Leave Liability (2.10%)		10,914.28
Total Forecast	\$	530,642.01

Paylist 022-2698
STOB 5001

Sum of Amount	Column Labels	
Row Labels	2018-08-04	Grand Total
00118396	3,049.58	3,049.58
Hardy,Donald	3,049.58	3,049.58
Grand Total	3,049.58	3,049.58

SPEC TAX

Position	Position Title	Job Code Descr	Current Incumbent
90478	RPT Compliance Analyst	Clerk R14	Aikins,Jane (TA)
111407	Compliance Analyst	Clerk R14	Levesque,Daniel Edmond
111766	Supervisor, Levy Operations	Financial Officer R24	Vacant
118205	Research Analyst	Research Officer R21	Limoges-Bourgaut,Alexandre (TA)
118396	Senior Policy Analyst	Policy Analyst - Finance R27	Hardy,Donald
118827	Audit Analyst	Financial Officer R18	Vacant
118828	Audit Analyst	Financial Officer R18	Luong,Thuy Diem
118829	Audit Analyst	Financial Officer R18	McLaughlin,Heather (TA)
118830	Audit Analyst	Financial Officer R18	Roberts,Kacy Lyn (TA)
119171	Senior Tax Auditor	Financial Officer R27	Winker,Leah (TA)
119281	Sr. Pol Ana. Annual Prop. Tax	Policy Analyst - Finance R27	Vacant

Forecast		
YTD Actuals (5001,5096, 5097)-Aug Closed:	\$	116,356.35
Bi-Weeklyly Amt (Sep 1pp)	20,249.92	
Pay Periods Remaining	16	323,998.72
	\$	440,355.07
Planned Hires:		
111766	37,562.00	
118827	0	
119281	46,958.00	84,520.00
	\$	524,875.07
		1,475.11
	\$	526,350.18
Hrly Rate increase + ESD	\$	11,053.35
Leave Liability (2.10%)	\$	537,403.54
Total Forecast		

Paylist 022-2698	
STOB	5001

Sum of Amount	Column Labels	
Row Labels	2018-09-01	Grand Total
00090478	1,738.04	1,738.04
Aikins,Jane	1,738.04	1,738.04
00111407	1,776.10	1,776.10
Levesque,Daniel Edmond	1,776.10	1,776.10
00118205	2,164.82	2,164.82
Limoges-Bourgaut,Alexand	2,164.82	2,164.82
00118396	3,049.58	3,049.58
Hardy,Donald	3,049.58	3,049.58
00118827	1,920.96	1,920.96
Wahlstrom,Janice	1,920.96	1,920.96
00118828	2,256.61	2,256.61
Luong,Thuy Diem	2,256.61	2,256.61
00118829	2,164.82	2,164.82
McLaughlin,Heather	2,164.82	2,164.82
00118830	2,164.82	2,164.82
Roberts,Kacy Lyn	2,164.82	2,164.82
00119171	3,014.17	3,014.17
Winker,Leah	3,014.17	3,014.17
Grand Total	20,249.92	20,249.92

Paylist 022-2692	
STOB	(Multiple Items)

Sum of Amount		Column Labels										
Row Labels		2018-04-14	2018-04-28	2018-05-12	2018-05-26	2018-06-09	2018-06-23	2018-07-07	2018-07-21	2018-08-04	2018-08-18	Grand Total
00090478		1681.97	1776.1	1776.1	1776.1	1776.1	1776.1	1,776.10	1,776.10	1,776.10	1,776.10	17,666.87
Aikins,Jane		1681.97	1776.1	1776.1	1776.1	1776.1	1776.1	1,776.10	1,776.10	1,776.10	1,776.10	17,666.87
00111407		1776.1	1776.1	1776.1	1726.5	1776.1	1776.1	1,776.10	1,776.10	1,776.10	1,726.50	17,661.80
Levesque,Daniel Edmc		1776.1	1776.1	1776.1	1726.5	1776.1	1776.1	1,776.10	1,776.10	1,776.10	1,726.50	17,661.80
00118205						1082.41	2164.82	2,118.12	2,164.82	2,164.82	1,912.78	11,607.77
Limoges-Bourgaut,Alexandre						1082.41	2164.82	2,118.12	2,164.82	2,164.82	1,912.78	11,607.77
00118396								1,219.96	3,049.58			4,269.54
Hardy,Donald								1,219.96	3,049.58			4,269.54
00118827				1788.5	2044.51	2044.51	2044.51	2,044.51	2,044.51	2,044.51	2,044.51	16,100.07
Wahlstrom,Janice				1788.5	2044.51	2044.51	2044.51	2,044.51	2,044.51	2,044.51	2,044.51	16,100.07
00118828				2030.95	2256.61	2256.61	2256.61	2,256.61	2,256.61	2,256.61	2,256.61	17,827.22
Luong,Thuy Diem				2030.95	2256.61	2256.61	2256.61	2,256.61	2,256.61	2,256.61	2,256.61	17,827.22
00118829					2302.48	2164.82	2164.82	2,164.82	2,164.82	2,164.82	2,164.82	15,291.40
McLaughlin,Heather					2302.48	2164.82	2164.82	2,164.82	2,164.82	2,164.82	2,164.82	15,291.40
00118830						2394.25	2164.82	2,164.82	2,164.82	2,164.82	2,164.82	13,218.35
Roberts,Kacy Lyn						2394.25	2164.82	2,164.82	2,164.82	2,164.82	2,164.82	13,218.35
00119171											2,713.33	2,713.33
Winker,Leah											2,713.33	2,713.33
Grand Total		3458.07	3552.2	7371.65	10106.2	13494.8	14347.78	15,521.04	17,397.36	14,347.78	16,759.47	116,356.33

ESD + 1% Increase

Classification	Title	Pos #	Filled By
CLK 14R	Compliance Analyst	82040	Hinners, Silka
CLK 14R	Compliance Analyst	90478	Aikins,Jane
FO18 R	PRT Audit Analyst	118827	Whalstrom, Janice
FO18 R	Financial Analyst	118828	Luong,Thuy Diem
FO18 R	Financial Analyst	118829	McLaughlin,Heather
FO18 R	Financial Analyst	118830	Roberts,Kacy Lyn
FO Tax 27R	Tax Specialist & Policy Advisor	119281	McGill, Catherine
FO Tax 24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker
FO Tax 24R	Auditors Speculation Tax Supervisor	111766	Vacant
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald
AMDN O 24R ADMN O 21R	Research Analyst (SOPS)	118205	Limoges-Bourgaut,Alexandre

				7 Hrs	70Hrs	70Hrs	70Hrs	70Hrs		
Hrly Rate	1% Increase	0.40%	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total	
25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95	
25.3729	0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	24.87	101.95	
29.2073	0.292073	0.1168292	0.4089022	2.86	28.62	28.62	28.62	28.62	117.35	
32.2373	0.322373	0.1289492	0.4513222	3.16	31.59	31.59	31.59	31.59	129.53	
30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30	
40.3936	0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	39.59	162.30	
39.1966	0.391966	0.1567864	0.5487524	3.84	38.41	38.41	38.41	38.41	157.49	
42.1737	0.421737	0.1686948	0.5904318	4.13	41.33	41.33	41.33	41.33	169.45	
30.926	0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	30.31	124.26	
									1,475.11	

SPEC TAX

Position	Position Title	Job Code Descr	Current Incumbent	Forecast			Planned Hires:		
90478	RPT Compliance Analyst	Clerk R14	Aikins,Jane (TA)	YTD Actuals (5001,5096, 5097)-Sep Closed:		\$ 185,257.64	Auditors Speculation Tax Supe	111766	32,195.61
111407	Compliance Analyst	Clerk R14	Levesque,Daniel-Edmond	Bi-Weeklyly Amt (Sep 1pp)	21,361.38		Audit Analyst	118827	22,586.58
111766	Supervisor, Levy Operations	Financial Officer R24	Vacant	Pay Periods Remaining	13	277,697.94	Systems, Operations and Polic New		11,094.10
118205	Research Analyst	Research Officer R21	Limoges-Bourgaut,Alexandre (TA)			\$ 462,955.58	Systems, Operations and Polic New		11,094.10
118396	Senior Policy Analyst	Policy Analyst - Finance R27	Hardy,Donald	Planned Hires:		119,293.44	Systems, Operations and Polic New		11,094.10
118827	Audit Analyst	Financial Officer R18	Vacant	Hrly Rate increase + ESD		2,096.42	Systems, Operations and Polic New		11,094.10
118828	Audit Analyst	Financial Officer R18	Luong,Thuy Diem			\$ 584,345.43	Policy and Legislation Analyst New - Specul		20,134.84
118829	Audit Analyst	Financial Officer R18	McLaughlin,Heather (TA)	Leave Liability (2.10%)		12,271.25			119,293.44
118830	Audit Analyst	Financial Officer R18	Roberts,Kacy Lyn (TA)	Total Forecast		596,616.69			
119171	Senior Tax Auditor	Financial Officer R27	Winker,Leah (TA)						
119281	Sr. Pol Ana. Annual Prop. Tax	Policy Analyst - Finance R27	Vacant		\$ 537,403.54	Aug Forecast			
82040	Compliance Analyst	CLK 14R	Hinners, Silkca		\$ 59,213.15				

ED + 1% Increase													
								7 Hrs	70Hrs	70Hrs	70Hrs	70Hrs	
Classification	Title	Pos #	Filled By	Hrly Rate	1% Increase	0.40%	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total
CLK 14R	Compliance Analyst	82040	Hinners, Silkca	25.3729		0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	101.95
CLK 14R	Compliance Analyst	90478	Aikins,Jane	25.3729		0.253729	0.1014916	0.3552206	2.49	24.87	24.87	24.87	101.95
FO18 R	PRT Audit Analyst	118827	Whalstrom, Janice	29.2073		0.292073	0.1168292	0.4089022	2.86	28.62	28.62	28.62	117.35
FO18 R	Financial Analyst	118828	Luong,Thuy Diem	32.2373		0.322373	0.1289492	0.4513222	3.16	31.59	31.59	31.59	129.53
FO18 R	Financial Analyst	118829	McLaughlin,Heather	30.926		0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	124.26
FO18 R	Financial Analyst	118830	Roberts,Kacy Lyn	30.926		0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	124.26
FO Tax 27R	Tax Specialist & Policy Advisor	119281	McGill, Catherine	40.3936		0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	162.30
FO TAX 24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker	40.3936		0.403936	0.1615744	0.5655104	3.96	39.59	39.59	39.59	162.30
FO Tax 24R	Auditors Speculation Tax Supervisor	111766	Vacant	39.1966		0.391966	0.1567864	0.5487524	3.84	38.41	38.41	38.41	157.49
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald	42.1737		0.421737	0.1686948	0.5904318	4.13	41.33	41.33	41.33	169.45
AMDN O 24R ADMN O 21R	Research Analyst (SOPS)	118205	Limoges-Bourgaut,Alexandre	30.926		0.30926	0.123704	0.432964	3.03	30.31	30.31	30.31	124.26
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	124.26
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	124.26
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	124.26
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	124.26
ADMN O 24R	Policy and Legislation Analyst	New	Vacant	35.832		0.35832	0.143328	0.501648	3.51	35.12	35.12	35.12	124.26
													2,096.42

SPEC TAX

Classification	Title	Pos.#	Filed By
CLK 148	Compliance Analyst	82040	Hewers, Silica
CLK 148	Compliance Analyst	90476	Akins, Jane
FD18 R	PPT Audit Analyst	118827	Wassil
FD18 R	Financial Analyst	118828	Ursula, Thuy Diem
FD18 R	Financial Analyst	118829	McLaughlin, Heather
FD18 R	Financial Analyst	118830	Roberts, Kary Lyn
FD Tax 278	Tax Specialist & Policy Advisor	110281	Wright, Catherine
RD TAX 248 FD Tax 278	Auditors Sr. Auditor	119171	Leah Windsor
FD Tax 248	Auditors Specification Tax Supervisor	111766	Wright
FD R 178	Policy Analyst (SOPs)	118205	Hendy, David
ADMIN 248 ADMIN O 218	Research Analyst (SOPs)	118205	Linneen-Beaugout, Alexandre

Forecast

YTD Actuals (0001,0096, 1007)-Oct Closed

8 Weekly Act (Sep 10pt)

Pay Periods Remaining

Planned Hires

Half Rate Increase + ESD

Leave Liability (2.10%)

Total Forecast

Planned Hires

Branch Name

Position Title

Position #

Classification

Salary

ESD + 1% Increase

Classification	Title	Pos.#	Filed By
CLK 148	Compliance Analyst	82040	Hewers, Silica
CLK 148	Compliance Analyst	90476	Akins, Jane
FD18 R	PPT Audit Analyst	118827	Wassil
FD18 R	Financial Analyst	118828	Ursula, Thuy Diem
FD18 R	Financial Analyst	118829	McLaughlin, Heather
FD18 R	Financial Analyst	118830	Roberts, Kary Lyn
FD Tax 278	Tax Specialist & Policy Advisor	110281	Wright, Catherine
FD Tax 248 FD Tax 278	Auditors Sr. Auditor	119171	Leah Windsor
FD Tax 248	Auditors Specification Tax Supervisor	111766	Wright
FD R 178	Policy Analyst (SOPs)	118205	Hendy, David
ADMIN 248 ADMIN O 218	Research Analyst (SOPs)	118205	Linneen-Beaugout, Alexandre
CDOP LV. 2	Systems, Operations and Policy	New	Wassil
CDOP LV. 2	Systems, Operations and Policy	New	Wassil
CDOP LV. 2	Systems, Operations and Policy	New	Wassil
ADMIN O 248	Policy and Legislation Analyst	New	Wassil

Hourly Rate	1% Increase	0.40%	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total
25.3729	0.253729	0.1014016	0.3551306	2.49	24.87	24.87	24.87	24.87	101.95
25.3729	0.253729	0.1014016	0.3551306	2.49	24.87	24.87	24.87	24.87	101.95
29.2073	0.292073	0.1168292	0.4089022	2.86	28.62	28.62	28.62	28.62	117.35
32.2373	0.322373	0.1289402	0.4513132	3.16	31.59	31.59	31.59	31.59	129.53
30.506	0.30506	0.1227004	0.4277604	3.03	30.31	30.31	30.31	30.31	124.26
30.506	0.30506	0.1227004	0.4277604	3.03	30.31	30.31	30.31	30.31	124.26
40.3936	0.403936	0.1613744	0.5653104	3.96	39.59	39.59	39.59	39.59	162.30
40.3936	0.403936	0.1613744	0.5653104	3.96	39.59	39.59	39.59	39.59	162.30
39.1966	0.391966	0.1567964	0.5487624	3.84	38.41	38.41	38.41	38.41	157.49
42.1317	0.421317	0.1680948	0.5894128	4.13	41.31	41.31	41.31	41.31	169.45
30.506	0.30506	0.1227004	0.4277604	3.03	30.31	30.31	30.31	30.31	124.26
24.6789	0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	24.19	124.26
24.6789	0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	24.19	124.26
24.6789	0.246789	0.0987156	0.3455046	2.42	24.19	24.19	24.19	24.19	124.26
35.832	0.35832	0.143328	0.501648	3.51	35.12	35.12	35.12	35.12	142.33
									623.18

SPEC TAX

Classification	Title	Pos #	Filled By
CLK 14R	Compliance Analyst	82040	Hinners, Silkca
CLK 14R	Compliance Analyst	90478	Aikins,Jane
FO18 R	PRT Audit Analyst	118827	Stewart,Michael
FO18 R	Financial Analyst	118828	Luong,Thuy Diem
FO18 R	Financial Analyst	118829	Cruwys,Wilma-Lee
FO18 R	Financial Analyst	118830	Marwaha,Gurpardeep
FO Tax 27R	Tax Specialist & Policy Advisor	119281	McGill, Catherine
FO TAX-24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker
FO Tax 24R	Auditors Speculation Tax Supervisor	111766	Vacant
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald
AMDN O 24R-ADMN O 21R	Research Analyst (SOPS)	118205	Limoges-Bourgaut,Alexandre

Forecast

YTD Actuals (\$001,5096, 5097)-Oct Closed:	\$	268,662.34
Bi-Weekkly Amt (Sep 1pp)	19,579.35	
Pay Periods Remaining	9	176,214.15
	\$	444,876.49
Planned Hires:		51,171.91
Hrly Rate increase + ESD		2,538.21
	\$	498,586.61
		10,470.32
	\$	509,056.93
Leave Liability (2.10%)		
Total Forecast		
	\$	549,366.13
	-\$	40,309.21
		OCT Forecast Variance

Planned Hires:

Branch Name	Position Title	Position #	Classification	Salary
PTB	Systems, Oper New		COOP LVL 2	11,094.10
PTB	Systems, Oper New		COOP LVL 2	11,094.10
PTB	Systems, Oper New		COOP LVL 2	11,094.10
PTB	Systems, Oper New		COOP LVL 2	11,094.10
RMO	Policy and Leg New - Specula	ADMN O 24R		6,795.50
				51,171.91

ESD + 1% Increase

Classification	Title	Pos #	Filled By	Hrly Rate	1% Increase	0.2392	Total Hourly Increase	02-Feb	16-Feb	02-Mar	16-Mar	30-Mar	Total
CLK 14R	Compliance Analyst	82040	Hinners, Silkca	25.3729		0.253729	0.2392	0.492929	3.45	34.51	34.51	34.51	141.47
CLK 14R	Compliance Analyst	90478	Aikins,Jane	25.3729		0.253729	0.2392	0.492929	3.45	34.51	34.51	34.51	141.47
FO18 R	PRT Audit Analyst	118827	Whalstrom, Janice	29.2073		0.292073	0.2392	0.531273	3.72	37.19	37.19	37.19	152.48
FO18 R	Financial Analyst	118828	Luong,Thuy Diem	32.2373		0.322373	0.2392	0.561573	3.93	39.31	39.31	39.31	161.17
FO18 R	Financial Analyst	118829	McLaughlin,Heather	30.926		0.30926	0.2392	0.54846	3.84	38.39	38.39	38.39	157.41
FO18 R	Financial Analyst	118830	Roberts, Kacy Lyn	30.926		0.30926	0.2392	0.54846	3.84	38.39	38.39	38.39	157.41
FO Tax 27R	Tax Specialist & Policy Advisor	119281	McGill, Catherine	40.3936		0.403936	0.2392	0.643136	4.50	45.02	45.02	45.02	184.58
FO TAX 24R FO Tax 27R	Auditors Sr. Auditor	119171	Leah Winker	40.3936		0.403936	0.2392	0.643136	4.50	45.02	45.02	45.02	184.58
FO Tax 24R	Auditors Speculation Tax Supervisor	111766	Vacant	39.1966		0.391966	0.2392	0.631166	4.42	44.18	44.18	44.18	181.14
POL FI 27R	Policy Analyst (SOPS)	118396	Hardy,Donald	42.1737		0.421737	0.2392	0.660937	4.63	46.27	46.27	46.27	189.69
AMDN O 24R ADMN O 21R	Research Analyst (SOPS)	118205	Limoges-Bourgaut,Alexandre	30.926		0.30926	0.2392	0.54846	3.84	38.39	38.39	38.39	157.41
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.2392	0.485989	3.40	34.02	34.02	34.02	139.48
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.2392	0.485989	3.40	34.02	34.02	34.02	139.48
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.2392	0.485989	3.40	34.02	34.02	34.02	139.48
COOP LVL 2	Systems, Operations and Policy	New	Vacant	24.6789		0.246789	0.2392	0.485989	3.40	34.02	34.02	34.02	139.48
ADMN O 24R	Policy and Legislation Analyst	New	Vacant	35.832		0.35832	0.2392	0.59752	4.18	41.83	41.83	41.83	171.49
													2,538.21

82040	Compliance Analyst	CLK 14R	Hinners, Silkca
90478	RPT Compliance Analyst	Clerk R14	Aikins,Jane (TA)
111407	Compliance Analyst	Clerk-R14	Levesque,Daniel-Edmond
111766	Supervisor, Levy Operations	Financial Officer R24	Vacant
118205	Research Analyst	Research Officer R21	Limoges-Bourgaut,Alexandre (TA)
118396	Senior Policy Analyst	Policy Analyst - Finance R27	Hardy,Donald
118827	Audit Analyst	Financial Officer R18	Vacant
118828	Audit Analyst	Financial Officer R18	Luong,Thuy Diem
118829	Audit Analyst	Financial Officer R18	McLaughlin,Heather (TA)
118830	Audit Analyst	Financial Officer R18	Roberts, Kacy Lyn (TA)
119171	Senior Tax Auditor	Financial Officer R27	Winker,Leah (TA)
119281	Sr. Pol Ana. Annual Prop. Tax	Policy Analyst - Finance R27	Vacant

Spec Tax

Forecast			
YTD Actuals (5001,5096, 5097)-Jan Closed:			
Paylist 022-2692	\$	195,871.74	
Paylist 022-2698		<u>129,548.15</u>	\$ 325,419.89
Bi-Weekkly Amt (Feb 2 pp)		22,914.08	
Pay Periods Remaining		<u>5</u>	<u>114,570.40</u>
		\$	439,990.29
Planned Hires:			10,235.31
Hrly Rate increase + ESD		<u>2,398.73</u>	
		\$	452,624.33
Leave Liability (2.10%)			9,505.11
Total Forecast		<u>\$</u>	<u>462,129.45</u>

ESD + 1% increase:

Classification		Title	Pos #	Filled By	Hrly Rate	1% Increase	0.2392	Total Hourly Increase	7 Hrs	70Hrs	70Hrs	70Hrs	70Hrs	Total
										02-Feb	16-Feb	02-Mar	16-Mar	30-Mar
CLK 14R	Compliance Analyst		82040	Hinners, Silka	25.3729	0.253729	0.2392	0.492929		3.45	34.51	34.51	34.51	34.51
CLK 14R	Compliance Analyst		90478	Aikins,Jane	25.3729	0.253729	0.2392	0.492929		3.45	34.51	34.51	34.51	34.51
FO18 R	PRT Audit Analyst		118827	Whalstrom, Janice	29.2073	0.292073	0.2392	0.531273		3.72	37.19	37.19	37.19	37.19
FO18 R	Financial Analyst		118828	Luong,Thuy Diem	32.2373	0.322373	0.2392	0.561573		3.93	39.31	39.31	39.31	39.31
FO18 R	Financial Analyst		118829	McLaughlin,Heather	30.926	0.30926	0.2392	0.54846		3.84	38.39	38.39	38.39	38.39
FO18 R	Financial Analyst		118830	Roberts,Kacy Lyn	30.926	0.30926	0.2392	0.54846		3.84	38.39	38.39	38.39	38.39
FO Tax 27R	Tax Specialist & Policy Advisor		119281	McGill, Catherine	40.3936	0.403936	0.2392	0.643136		4.50	45.02	45.02	45.02	45.02
FO TAX 24R FO Tax 27R	Auditors Sr. Auditor		119171	Leah Winker	40.3936	0.403936	0.2392	0.643136		4.50	45.02	45.02	45.02	45.02
FO Tax 24R	Auditors Speculation Tax Supervisor		111766	Vacant	39.1966	0.391966	0.2392	0.631166		4.42	44.18	44.18	44.18	44.18
POL FI 27R	Policy Analyst (SOPS)		118396	Hardy,Donald	42.1737	0.421737	0.2392	0.660937		4.63	46.27	46.27	46.27	46.27
AMDN O 24R ADMN O 21R	Research Analyst (SOPS)		118205	Limoges-Bourgaut,Alexandre	30.926	0.30926	0.2392	0.54846		3.84	38.39	38.39	38.39	38.39
COOP LVL 2	Systems, Operations and Policy		120622	Vacant	24.6789	0.246789	0.2392	0.485989		3.40	34.02	34.02	34.02	34.02
COOP LVL 2	Systems, Operations and Policy		120821	Powell,Robert	24.6789	0.246789	0.2392	0.485989		3.40	34.02	34.02	34.02	34.02
COOP LVL 2	Systems, Operations and Policy		120822	Collins,Kerswill	24.6789	0.246789	0.2392	0.485989		3.40	34.02	34.02	34.02	34.02
COOP LVL 2	Systems, Operations and Policy		New	Vacant	24.6789	0.246789	0.2392	0.485989		3.40	34.02	34.02	34.02	34.02
ADMN O 24R	Policy and Legislation Analyst		New	Vacant	35.832	0.35832	0.2392	0.59752		4.18	41.83	41.83	41.83	41.83
														171.49
														<u>2,398.73</u>

Planned Hires Fiscal 2019:

Branch Name	Position Title	Position #	Amt
RMO	Policy and Legislation Analyst	New - Speculation Tax Position	2,558.83
PTB	Data and Reporting Researcher	118205	7,676.49
PTB	Compliance Analyst	90478	-
			<u>\$ 10,235.31</u>

Page 40 to/à Page 85

Withheld pursuant to/removed as

s.12;s.13

From: [Emery, Steven B FIN:EX](#)
To: [Khaira, Kally FIN:EX](#); [Brouwer, Deborah FIN:EX](#); [Graboski, Anne FIN:EX](#)
Subject: Spec Tax Resources
Date: December 7, 2018 4:51:55 PM

Just so we are all on the same page. Here's our initial list of 11 positions approved already for SVT:

APT (9 new positions to support the Speculation Tax)

- **Tax Specialist** FO27 – position 00119281 – vacant (to be TA'd by Catherine McGill)
- **Senior Tax Auditor** FO27 – position 00119171 – vacant (TA being offered to Leah Winker)
- **Speculation Tax Supervisor** FO24 – position 0011766 – vacant (Job Profile being developed)
- **Audit Analyst** FO18 – position 118828 – filled (Thuy)
- **Audit Analyst** FO18 – position 118827 – filled (Janice)
- **Audit Analyst** FO18 – position 118830 – filled (Deep)
- **Audit Analyst** FO18 – position 118829 – filled (new person)
- **Compliance Analyst** FO14 – position 111407 – filled (Dan)
- **Compliance Analyst** FO14 – position 90478 – filled (Jane)

SOPS (2 new positions to support the Speculation Tax)

- **Research Analyst** AO24 – position 118205 – vacant
- **Senior Policy Analyst** FI27 – position 118396 – filled (Don Hardy)

s.12,s.13

Steven Emery MPA, CPA, CMA
Executive Director, Property Taxation Branch
Revenue Division, Ministry of Finance

Trusted financial and economic leadership for a prosperous province

Page 88 to/à Page 95

Withheld pursuant to/removed as

s.12;s.13