SOCIETY OF NOTARIES PUBLIC OF BC

P.O. Box 44 Suite 700 625 Howe Street
Vancouver BC V6C 2T6 • Tel. (604) 681 4516
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Board of Directors Meeting

Draft Agenda (Open) Session

Values

Trust Transparency Competence Integrity Fairness Flexibility

Date: April 17, 2026
Time: 09:30
Location: Held Electronically via Video Conference

Board
Vicki van As - President
Jonathan Wong – First Vice President
Dan Boisvert– Second Vice President
Andrea Banks
Michelle Broughton
Lilian Cazacu
Bill Chan
Rosalyn Mow
Alan Treleaven
Olesea Zadoinova
Hassan el Masri – Past President

Staff
John Mayr – Executive Director
Marny Morin – Secretary & Director of Programs & Services
Eric Fryatt – Chief Financial Officer
Hilde Deprez – Manager Education Programs
Karen Lau – Executive Assistant

Guests

The Board, at each meeting and prior to taking any action, purposely focus on how an action may be perceived by an informed person considering the public interest.	
1. Call to Order	(2 min)
2. Territorial Acknowledgement	(5 min)
3. Approval of Agenda	(2 min)
4. Consent Agenda 4.1 Minutes of the Previous Meeting	(10 min) Discussion
5. Succession Planning Update	

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NOTARIUS EQUIPELLET
INCORPORATED 1926

Be it resolved that the Board of Directors formally appoint Mr. as the Executive Director and CEO of The Society of Notaries Public of BC effective July 1, 2026. 6. Strategic Directions 6.1 Strategic Direction #1 - Public Interest and Risk-focused Regulation 6.1.1 Update - Practice Standards committee – (Van As) 6.1.2 Submission to CABRO regarding the SNPBC recommendation to the Board of Examiners 6.1.3 Finance Committee – Recommendation and resolution regarding the proposed budge 6.2 Strategic Direction #2 –Enhancing Professional Competence 6.2.1 Report: Director of Programs and Services – Education and Practice Inspections (Morin) 6.3 Strategic Direction #3 – Stakeholder Engagement 6.3.1 Report of the Secretary (Morin) 6.3.2 Update – Request for Proposals – Auditing Services (Fryatt) 6.3.3 Update - Regulated Paralegal Working Group (Wong) 6.3.4 Briefing Note – Single Legal Regulator activity 6.3.5 Briefing Note – Combined Operations Working Group	
7. Question and Answer with Notaries	Discussion (15 min)
8. Meeting dates	
9. Adjournment	(2 min)

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Board of Directors

Draft MINUTES

Values

Trust Transparency Competence Integrity Fairness Flexibility

Date: January 20, 2026

Call to Order: 11: 05 a.m. (PDT)

Location of Meeting: Virtual

In Attendance: Vicki van As, Andrea Banks, Michelle Broughton, Dan Boisvert, Bill Chan, Lilian Cazacu, Hassan el Masri, Rosalyn Mow, Alan Treleaven, Jonathan Wong, Olesea Zadoinova

Staff in attendance: John Mayr, Executive Director; Marny Morin, Secretary; Eric Fryatt, Chief Financial Officer; Hilde Deprez, Manager Education Programs; Richenda Grafton, Executive Assistant' Anastasia Kostaki, Manager Legal Compliance and Discipline; Filip de Sagher, Manager of Complaints,

Guests: Avichay Sharon and Haley Richardson Legal Counsel; Branch MacMaster LLP

1.0 MEETING CALL TO ORDER

The Chair called the meeting to order at 09:05a.m.

2.0 APPROVAL OF AGENDA

The agenda was approved as circulated.

3.0 Strategic Directions

Strategic Direction #1 - Public Interest and Risk-focused Regulation

3.1 The Chair introduced Counsel to discipline and directors' panels. Mr. Avichay Sharon and Ms. Haley Richarson provided an overview of their firm, their approach to matters, and their areas of practice.

No action arising.

3.2 Practice Standards Committee: The chair spoke to the briefing note that included in the board information package. She reported that the Committee has proposed an approach to develop standards of practice and criteria for education programming. At this preliminary stage, the plan is to hire a project manager and legal writer to assist in the development of the standards of practice.

No action arising

3.3 Complaints, Inquiry, and Discipline: Staff spoke to the briefing note that included in the board information package about the complaints, inquiry and discipline process and current trends, they reported on complaint status, negotiations of agreements, and discipline proceedings.

No action arising

3.4 Integrity of the trust accounting system: Director Cazacu spoke to his briefing notes included as part of the board information package.

Action – Refer the matter for consideration by the Insurance Committee the issue of general coverage for loss due to social engineering;
Action- Practice Standards to committee for the development of standards related trust account system preventative strategies, member guidance, and advocacy opportunities.

Strategic Direction #2 –Enhancing Professional Competence

3.5 Notary Education Program: Staff spoke to the briefing note that included in the board information package on the notary education program, status of students currently engaged in the program, and emerging challenges. One of the challenges is the difference in knowledge and familiarity with conveyance practice given diversity in the learning cohort. To address this issue and level the knowledge base, the Society has engaged with a provider of a Conveyance course. Ms. Morin provided an overview of the course.
No action arising

Strategic Direction #3 – Stakeholder Engagement

3.6 Report of the Secretary: The secretary provided an overview of her written report. She noted the passing of member Navreet Dhillon.

Action: Be it resolved that the Board of Directors of the Society of Notaries Public of British Columbia accept the resignation of Marnie Gunther effective November 1, 2025, subject to her fulfilling end of practice matters.
Carried

3.7 Membership and Admissions Committee: The chair of the committee spoke to her written report on the committee's meeting to consider and approve applicants to the Notary Education program.

No action arising

3.7 Regulated Paralegal Taskforce Report – The Executive Director spoke to the written briefing note included in the board information package.
No action arising

3.8 Internal Financial Reports – the board agreed to move the report of the CFO from the consent agenda to the open session. Director Chan asked questions about the costs associated with the single legal regulator. The CFO explained the items in rows 111 and 112 of his written report.
Action by consensus – to approve the internal financial reports as presented.

3.9 Consent Agenda
Action – resolution to approve the consent agenda
Carried.
Motion to Adjourn- 10:45

Approved

_____ _____

John Mayr Executive Director Vicki van As President

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Briefing Note

To: Board of Directors

Re: 6.1.1 - Practice Standards Committee

Meeting Date: April 17, 2026

Background

The Practice Standards Committee was reconstituted this year at the request of the Board President. The first meeting of the Committee took place on February 5th and was largely an introduction and review of the mandate of the Committee. The President discussed her vision for the creation of a set of practice standards to inform our student education, practice inspections, and to assist members to practice to a set of standards, all in the public interest.

The scope of the project was discussed. It is intended that a consultant or consultants be hired to assist in moving the project along, conducting research, and in writing the proposed standards. Consultation and engagement with members will be required at various stages and will take some time to ensure that all areas of practice, office management and communications are encompassed in the standards.

The Way Forward

The President and Marny met with Darrel Pink. Darrel I. Pink is a lawyer with expertise in legal ethics and regulation. He has devoted his career to the advancement of professional accountability, ethics and regulation in the legal sector across Canada and internationally. Darrel facilitated the Society's then Board of Directors at their strategic planning retreat in Victoria in March 2020. He is the former CEO of the Nova Scotia Barristers Society and worked with them to create their own set of practice standards.

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Darrel is excited to help us with this project. In his view, "the enforceability of professional standards will be a challenge, but that should not be a concern, as the goal of standards is the improvement of practice".

Given that standards are intended to reflect legal and professional requirements, it is essential that all notaries have an opportunity to consider and comment on standards before they are adopted. This will lend credibility to the process and support their use in practice.

Therefore, the Committee will establish a procedure for engaging and collaborating with the notarial profession. The more feedback we can obtain from the profession, the more dependable the standards the Society adopts will be.

The Role of the Committee

"As practicing notaries, committee members will bring their expertise to the process by identifying the areas that are appropriate for professional standards and what the standard is. The Committee's mandate of 'developing, establishing, and publishing' is best understood as articulating what the standard of practice is as opposed to what it might be in a 'better world.' By approaching the task from this perspective, **the Committee will not see itself as responsible for stating best or ideal practices, but rather for determining what the standard is, based on its own experience and the authorities that support its position".**

This process will take time. We expect it to take years as opposed to months, with priority given to areas of practice throughout the stages of the process. Each area will require research to determine legislative, regulatory, or court authorities to support it. The Committee will consider hiring a second consultant to perform that research.

Funding

We are informed that the next Foundation meeting is in June. Our application for funding for this project will be considered at that time. The Committee is working with Darrel Pink to identify a realistic budget for this project to inform our application to the Foundation.

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Briefing Note

To: Board of Directors
From: John Mayr Executive Director

Re: Submission of recommendation re Notary Public Board of Examiners

Meeting Date: April 17, 2026

The Ministry of the Attorney General request the submission of various forms related to the appointment of a person to the Notary Public Board of Examiners. The Board is comprised of three persons, of which historically at least one is a member of the Law Society of BC.

After the opportunity was promoted in the SNPBC member bulleting, Mr. Usher expressed interest in the position. He meets the requirements of being a member of the Law Society of BC.

The forms were completed and submitted to the Ministry.

The Ministry has subsequently advised that the Crown Agency and Board Resourcing office wishes to post the position.

No Action is required

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Briefing Note

To: Board of Directors
From: Finance Committee

Re: Proposed budget for the year July 1, 2026 through June 30. 2027

Meeting Date: April 17, 2026

The Finance Committee has met to consider and recommend to the Board a budget for the year ending June 30, 2027.

Be it resolved that on the recommendation of the Finance Committee of the Society of Notaries Public of BC that the Board of Directors approve the budget as presented.

Be it resolved that on the recommendation of the Finance Committee of the Society of Notaries Public of BC that the Board of Directors approve the increase in membership fees as Regular, Roving and Non-practicing member classes of $3,075, $2,746 and $549 respectively.

Society of Notaries Public
Budget 2026-2027

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CASH BASIS

	A	B	C	D	E	F	G	H
1					GENERAL FUND			
2					2025-2026	2025-2026	2025-2026	2026-2027
3					ACTUAL	PROJECTED	BUDGET	BUDGET
4					JANUARY			
5		**REVENUES**						
11		EVALUATION FEES			13,950	15,000	12,600	15,000
13		INCORPORATION FEES			1,800	3,000	2,500	2,500
14		INTEREST - BANK ACCT			26,001	50,000	70,000	70,000
15		MEMBER FINES			22,500	30,000	15,000	25,000
16		MEMBER DUES			838,356	1,410,000	1,410,000	1,485,000
19		TUITION FEES			237,875	237,875	210,000	250,000
20		MISCELLANEOUS			2,480	4,000	1,000	3,500
21								
22		**TOTAL OPERATING INCOME**			1,142,962	1,749,875	1,721,100	1,851,000
23								
24		**TRANSFERS IN (OUT) FROM OTHER FUNDS**						
25		TAF	Transfer		1,365,000	1,365,000	1,365,000	1,450,000
32		CON	Transfer		-	-	-	400,000
33								
34		**TOTAL TRANSFERS IN (OUT)**			1,365,000	1,365,000	1,365,000	1,850,000
43								
44		**GROSS RECEIPTS**			2,507,962	3,114,875	3,086,100	3,701,000
45								
46								

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Society of Notaries Public
Budget 2026-2027

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CASH BASIS

	A	B	C	D	E	F	G	H
1					GENERAL FUND			
2					2025-2026	2025-2026	2025-2026	2026-2027
3					ACTUAL	PROJECTED	BUDGET	BUDGET
4					JANUARY			
47		GENERAL AND ADMINISTRATIVE EXPENSE						
48		ADMISSION EXPENSE			29,335	29,335	30,000	31,000
51		BCNA CONFERENCE			-	7,500	7,500	7,500
53		AUDIT - MEMBERS			363,083	700,000	700,000	700,000
54		AUDIT AND ACCOUNTING			67,731	67,731	60,000	70,000
55		AUTO EXPENSE- PARKING			3,313	6,000	6,000	6,000
56		BANK CHARGES			2,492	5,000	7,000	5,000
57		BANKCARD FEES			32,667	65,000	70,000	65,000
58		COMMITTEE MEETINGS			4,000	20,000	35,000	30,000
59		COMMUNITY ENGAGEMENT			5,000	5,000	5,000	5,000
60		CONSULTING FEES			920	5,000	10,000	5,000
61		CONTINUING EDUCATION & PRO DEV (STAFF)			8,843	18,000	25,000	25,000
62		CREDIT REPORTS & EVALUATION			3,663	5,000	5,000	5,000
63		DEPRECIATION			-	20,000	20,000	20,000
64		DIRECTORS MEETINGS			13,219	40,000	60,000	50,000
65		INFORMATION TECHNOLOGY			113,200	190,000	200,000	190,000
68		EXECUTIVE DIRECTOR			-	2,500	5,000	5,000
69		INSURANCE			30,553	40,000	35,000	40,000
70		LEASED EQUIPMENT			3,710	7,000	7,000	7,000
71		LEGAL FEES - TOTAL			116,530	175,000	225,000	175,000
74		MEMBER WELLNESS INITIATIVES			8,976	15,000	15,500	15,500
75		MISCELLANEOUS			7,503	12,000	12,500	12,500
77		OFFICE SUPPLIES AND SERVICES			7,210	15,000	17,500	17,500
78		POSTAGE AND COURIER			1,867	3,500	7,500	5,000
81		PURCHASE OF EQUIPMENT			-	10,000	10,000	10,000
82		RENT AND UTILITIES			199,500	349,000	342,500	350,000
83		RENT RECOVERED			-	(14,500)	(14,500)	(14,750)
85		GOVERNMENT RELATIONS			-	2,500	5,000	5,000
86		EDUCATION - NEW NOTARIES LUNCHEON			10,107	10,107	12,000	12,000
87		EDUCATION - NEW NOTARIES			16,650	20,000	25,000	25,000
88		TELEPHONE AND FAX			2,845	5,000	6,000	5,500
89		TRAVEL			5,326	7,500	10,000	8,000
91		WAGES - REGULAR			716,282	1,250,000	1,250,000	1,350,000
92		BENEFITS REGULAR			67,301	115,000	120,000	130,000
93		WAGES - CASUAL			-	-	5,000	5,000
94		SHARED EXPENSES RECOVERED			-	(10,000)	(10,000)	(7,500)
95								
96		**TOTAL GENERAL AND ADMINISTRATIVE**			1,841,827	3,198,173	3,326,500	3,370,250
97								
98								
99		**NET SURPLUS (SHORTFALL)**			666,135	(83,298)	(240,400)	330,750

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Society of Notaries Public
Budget 2026-2027

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CASH BASIS

	A	B	C	D	E	F	G	H
1					GENERAL FUND			
2					2025-2026	2025-2026	2025-2026	2026-2027
3					ACTUAL	PROJECTED	BUDGET	BUDGET
4					JANUARY			
100								
101		PROJECTS						
105		STRATEGIC PLANNING			-	-	30,000	30,000
106		SUCCESSION PLANNING			27,000	50,000	50,000	-
107		SLR TRANSITION - INTERNAL (LEGAL, OTHER)			170,667	200,000	125,000	150,000
108		SLR TRANSITION - SHARED W/LSBC			221,279	380,000	150,000	460,000
109		RETENTION PROGRAM			-	-	-	130,000
110		TOTAL PROJECTS			418,946	630,000	355,000	770,000
111		**INCREASE (DECREASE) FUND BAL**			**247,189**	**(713,298)**	**(595,400)**	**(439,250)**
112								
113		FUND BAL - START			9,254,760	9,254,760	9,254,760	8,541,462
114		FUND TRANSFER - PRIOR YEAR						
115		**FUND BAL - END**			**9,501,949**	**8,541,462**	**8,659,360**	**8,102,212**
116								
117								
118								
119		OPERATIONS SUMMARY						
120		TOTAL OPERATING INCOME			1,142,962	1,749,875	1,721,100	1,851,000
121		TOTAL GENERAL AND ADMINISTRATIVE			1,841,827	3,198,173	3,326,500	3,370,250
122		NET OPERATIONS			(698,865)	(1,448,298)	(1,605,400)	(1,519,250)
123								
124		NON OPERATIONS						
125		TRANSFERS			1,365,000	1,365,000	1,365,000	1,850,000
126		INTEREST INCOME			-	-	-	-
127		LESS PROJECTS			418,946	630,000	355,000	770,000
128		TRANSFERS			-	-	-	-
129								
130		INCREASE (DECREASE) FUND BAL			247,189	(713,298)	(595,400)	(439,250)
131								

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SOCIETY OF NOTARIES PUBLIC
TRUST ADMINISTRATION FEE
BUDGET 2026-2027

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CASH BASIS

	A	B	C	D	E
1					
2		2025-2026	2025-2026	2025-2026	2026-2027
3		ACTUAL	PROJECTED	BUDGET	BUDGET
4		JANUARY			
5	REVENUES				
6	MEMBER FINES	-		-	
7	TRUST ADMINISTRATION FEE	959,395	1,750,000	1,850,000	1,750,000
8					
9	INTEREST AND INVESTMENT INCOME				
10	DIVIDEND INCOME	2,463	5,000	7,500	7,500
11	INTEREST REVENUE	61,590	100,000	80,000	80,000
12	GAIN (LOSS) ON INVESTMENTS	732	5,000	20,000	20,000
13	FMV ADJUSTMENT				
14	TOTAL INVESTMENT INCOME	64,785	110,000	107,500	107,500
15					
16	OTHER				
17					
18	TOTAL REVENUE	1,024,180	1,860,000	1,957,500	1,857,500
19					
20	TRANSFERS IN (OUT)				
24	GEN - TRANSFER	(1,365,000)	(1,365,000)	(1,365,000)	(1,450,000)
25	TOTAL TRANSFERS IN (OUT)	(1,365,000)	(1,365,000)	(1,365,000)	(1,450,000)
26					
27	GENERAL AND ADMINISTRATIVE EXPENSE				
28	BANK CHARGES	14	400	400	400
29	MANAGEMENT FEES - DIX	3,281	5,000	5,000	5,000
30	WITHHOLDING TAX	491	800	500	500
31	PAL	-	10,000	20,000	20,000
33	TRUST ACCOUNT MONITOR	-	5,000	10,000	10,000
34	TOTAL GENERAL AND ADMINISTRATIVE	3,786	21,200	35,900	35,900
35					
36	TOTAL EXPENSE & TRANSFERS	1,368,786	1,386,200	1,400,900	1,485,900
37					
38	INCREASE (DECREASE) FUND BALANCE	(344,607)	473,800	556,600	371,600
39					
40					
41	FUND BAL - START	7,197,772	7,197,772	7,197,772	7,671,572
42					
43	FUND BAL - END	6,853,166	7,671,572	7,754,372	8,043,172

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Society of Notaries Public
Budget 2026-2027

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CASH BASIS

	A	B	C	D	E	F	G	H
1					SPECIAL RESERVE			
2					2025-2026	2025-2026	2025-2026	2026-2027
3					ACTUAL	PROJECTED	BUDGET	BUDGET
4					JANUARY			
13		**REVENUES / TRANSFERS**						
14		FOUNDATION GRANTS			-	-	-	-
25								
26		**GROSS RECEIPTS**			-	-	-	-
27								
28								
29		**EXPENSES**						
30			SALARY AND ADMINISTRATION (NF)					
45			TOTAL SALARY & ADMINISTRATION		-	-	-	-
46								
56			NOTARY EDUCATION (SNPBC)					
58			LIBRARY		4,267	8,500	10,000	10,000
59			PRACTICE INSPECTION		36,871	100,000	150,000	120,000
60			EDUCATION - NEW NOTARY INSTRUCTION		1,145	60,000	60,000	60,000
61			EDUCATION - PROGRAM STAFFING		35,000	60,000	60,000	60,000
62			EDUCATION - STUDENT PORTAL		15,190	26,000	26,000	26,000
63			EDUCATION - REG REQ'D		-	-	5,000	5,000
65			TOTAL NOTARY EDUCATION		92,473	254,500	311,000	281,000
66								
67		TOTAL RECURRING EXPENSES			92,473	254,500	311,000	281,000
68								
69		**NET SURPLUS**			(92,473)	(254,500)	(311,000)	(281,000)
70								
71		**PROJECTS**						
85			NOTARY EDUCATION (SNPBC)					
90			COURSE UNIT DEVELOPMENT		3,207	15,000	20,000	20,000
91			TOTAL NOTARY EDUCATION		3,207	15,000	20,000	20,000
92								
93		TOTAL PROJECTS			3,207	15,000	20,000	20,000
94								
95		**INCREASE (DECREASE) FUND BAL**			**(95,680)**	**(269,500)**	**(331,000)**	**(301,000)**
96								
97		FUND BAL - START			1,039,765	1,039,765	1,039,765	770,265
98		FUND TRANSFER - TO NF RE: BCNA			-	-	-	-
99		**FUND BAL - END**			**944,085**	**770,265**	**708,765**	**469,265**
100								

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Budget Commentary for 2026/27

Meeting Date: April 8, 2026

This commentary is intended to assist with your review of the Society budget for the fiscal year ended June 30, 2027. Information presented for consideration includes actual balances at January 31st, projected balances to the end of the current year (CY or FY26), the approved budget for the current fiscal year, and the proposed budget for the coming fiscal year (BY or FY27). The fiscal year commences July 1st and ends June 30th.

Discussion focuses on major line items, areas of significant change, or areas that are otherwise deemed noteworthy.

General Fund

REVENUE

1. MEMBER DUES (row 16)

On budget in the CY as the timing and quantity of YTD member refunds are within the anticipated range. It is assumed there will be a net increase of 15 members (30 new notaries and 15 retirements) in the BY which will modestly contribute to the increase in dues revenue. The balance of the increase in dues revenue is attributable to a dues increase of 2.5%. This results in dues for Regular, Roving and Non-practicing member classes of $3,075, $2,746 and $549 respectively. This increase is slightly higher than the inflation rate of 1.7% and is considered prudent given the increased costs associated with the single legal regulator initiative. For context, this proposed increase and the PY increase are the first two dues increase since 2011. At that time, Regular member dues were increased from $3,000 to $3,300, and were kept at this rate until 2020 when they were decreased to $2,800.

2. TUITION FEES (row 19)

The y/y increase represents an increase in the size of the student class in FY27 to 30, compared to 28 in FY26.

TRANSFERS FROM OTHER FUNDS

3. TAF TRANSFER (row 25)

These transfers fund expenditures in the General Fund which meet the public protection mandate for TAF funds. These expenditures include the member audit program, custodianships, legal fees and administrative expenses. Budgeted TAF transfers for FY27 total $1.45M, which is an increase of 6.2% from the PY figure of $1.36M.

4. CONTINGENCY TRANSFER (row 32)

It is proposed that $400K be transferred from the Contingency Fund to the General Fund. The purpose of this transfer is to partly offset extraordinary costs associated with the single legal regulator initiative, which are expected to approximate $580K in the CY and $610K in the BY. This transfer would limit the erosion of General Fund reserves as a result of the significant costs related to this distinctive and extraordinary project.

EXPENSES

5. AUDIT – MEMBERS (row 52)

Member audit expenses are expected to approximate budget in the CY and have been budgeted at a similar level for FY27. Efforts to gain efficiencies in the member audit program have include implementation and refinement of risk-based selection procedures and the recovery of extra costs associated with factors which are controllable by members (i.e. disorganized files, lack of responsiveness, etc.).

The revised trust accounting rules which were first implemented into the FY25 audit year have now been fully incorporated into the program. These rules allow for greater specificity in audit procedures as the new rules are more focused. The more targeted procedures which are more precise at targeting identified areas of concern and should continue to provide for more efficiency in the program going forward.

6. INFORMATION TECHNOLOGY (row 65)

Current year expenditures are as expected, and a small decrease is forecasted in the BY as the GovCore database implementation is completed and some small IT-related efficiencies are realized.

7. LEGAL FEES (row 71)

Includes expenses related to the Society's retainer agreement, discipline, and other ad hoc legal expenses. YTD expenditures are 33% below budget due largely to less use

than anticipated in H1 of the fiscal year. Does not include legal expenses related to the single legal regulator initiative as these are reported elsewhere (rows 107).

8. RENT AND UTILITIES (row 82)

The current office lease agreement commenced August 1, 2024. This lease is for a five-year term with an escape clause after two years to allow flexibility should the single legal regulator not require the space for the full term. A small amount of cost uncertainty exists due to the annual division of shared tenant costs, but these amounts are not expected to be material.

9. WAGES AND BENEFITS (row 91)

Salaries, wages and benefits are tracking on budget in the CY. The BY increase is due to additional staffing to bolster the discipline process. Excluded from this amount are the Transitional Board Indigenous Council advisors; the costs of which are shared with the Law Society of BC and accounted for separately in this budget.

10. STRATEGIC AND SUCCESSION PLANNING (rows 105, 106)

Both a strategic planning process (last one was March 2020) and succession planning expenditures were budgeted for in the current year. The assumption is related costs will be fully incurred in this period. As these are infrequent costs, no amounts have been included for either of these items in FY27.

11. SLR TRANSITION (rows 107, 108)

This includes internal expenditures specific to the society (row 107) and transition board expenditures that are being shared with LSBC (row 108). Internal costs are principally legal expenses related to the constitutional challenge of the Legal Professions Act. Shared costs are split on a 25%/75% basis, with SNPBC responsible for the 25% portion. The nature and magnitude of these shared expenditures was not well understood in the prior year and the variance between actual and budgeted figures reflects this. Current year cost estimates are far more certain than in the prior year.

12. RETENTION PLAN (row 109)

The retention plan funding as approved for in the FY25 budget covers the period ending June 30th, 2026. One year of further funding is proposed for the BY. It is anticipated further clarity around the direction and timing of the single legal regulator initiative will inform further funding of the plan beyond FY27.

13. INCREASE (DECREASE) IN FUND BALANCE (row 111)

In the CY both the net surplus and G&A are forecasted to end the fiscal year with a positive variance to budget. The General Fund deficit as proposed is largely a consequence of the anticipated transition to a single legal regulator. Amounts totaling $610K (transition amounts) in the BY are directly attributable to the transition and are non-recurring outside of that distinct project. A further $130K (retention plan) are indirectly attributable to the SLR project. Furthermore, there are operating cost efficiencies which could likely be realized given greater certainty around the SLR initiative.

Were the proposed FY27 deficit (row 111) to continue unchecked it would exhaust the fund balance in year 21.

Trust Administration Fund

14. TAF REVENUE (row 7)

Current fiscal year revenue is tracking behind budget and is forecasted to fall 5.4% short of the FY26 budget. This reflects weaker residential real estate transaction activity than budgeted for in the fiscal year. Continued weak activity is expected in the sector throughout FY27. For historical context, the mean and median levels of TAF revenue since the inception of the TAF program are $2.02M and $1.98M respectively.

15. TAF TRANSFERS (row 24)

See under General Fund above.

16. PAL (row 31)

This item includes Practice Advisory Line (PAL) personnel who are contracted to supplement the PAL services provided by salaried society staff. They are contracted on an as needed basis and expectation is for similar levels of need between FY26 and FY27.

Society Reserve Fund

The Society Reserve Fund is comprised of restricted funds which may be used for salaries and administration of the Notary Foundation (NF), as well as for the education and continuing education of notaries and notary applicants (per Notaries Act 52(8)(d)).

Prior to July 1, 2021, the governance agreement was in place whereby the Society received an annual grant from the Notary Foundation which funded the Society Reserve Fund. The Society used these funds to administer NF operations and education initiatives in accordance with Notaries Act 52(8)(d).

The governance agreement was terminated effective July 1, 2021, and the NF ceased its provision of an annual grant to the Society and assumed responsibility for its operations at this time (under Notaries Act 52(8)(d)(i)). The Society continues to fund education activities (in accordance with Notaries Act 52(8)(d)(ii)) from reserves present in the Society Reserve Fund.

17. PRACTICE INSPECTION (row 59)

Budget line represents contract providers of practice inspection services. CY costs are tracking behind budget due to a lower completion rate in the year. Completions are expected to climb over the balance of the fiscal year but still finish with a favourable variance to budget. Activity level is expected to be similar in the BY so the budgeted figure has been modified down compared with that of the current year.

18. EDUCATION – PROGRAM STAFFING (row 61)

Salary costs specific to management of the Notary Education Program have been moved from the General Fund to the Society Reserve budget. This was done to take further advantage of the Society Reserve Fund balance and its narrow restriction on usage.

19. PROJECT – COURSE UNIT DEVELOPMENT (row 90)

Funding for improvements to the educational materials used in the training of notary students. CY budget levels are sufficient to cover expenditures, and a similar level of costs are provided for in the BY.

20. INCREASE (DECREASE) IN FUND BALANCE (row 95)

The termination of the governance agreement on July 1, 2021 eliminated a mechanism which transferred certain grant funds to the Society. Current grants of this type from the Notary Foundation to the Society now require specific approval.

The Society continues to fund education activities in accordance with Notaries Act 52(8)(d)(ii) using reserves accumulated in the Society Reserve Fund. The budgeted deficit of $301K for FY26 reflects the continued funding of these commitments despite the absence of any incoming grants to offset these costs. This level of deficit would exhaust the current fund balance in year 3 (FY29) if left unchecked in the intervening period.

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Briefing Note

To: Board of Directors
From: Ms. Marny Morin Director of Program and Services
Meeting Date: April 17, 2026

1. **Student Education**:

Cohort 17 is now in the last leg of our Notary Education Program. This cohort has completed the first block of in person training, 6 weeks of mentoring, and now back for the last part of their in person training and oral exams. The statutory exams are scheduled for late May to avoid the World Cup events in June and July.

Of the 31 students enrolled from the SFU degree program, 22 have no legal experience at all. This is proving difficult for them as a group as the pace and intensity of the program is overwhelming for them and the course content quite foreign. The education manager, the conveyance course instructor and I will be meeting with Margaret Hall at SFU in May to discuss how best to transition students from the online studies at SFU to the intensity of our education program.

As reported in January, we have given the students free access to the online ConveyBC course and feedback has been very good. The breakdown of conveyance topics into short podcasts that they can go back and review at their own pace is proving very beneficial. If we continue to provide this resource to our students going forward, we will be able to adjust the program to provide a better flow of practical application.

2. **Practice Advice Line (PAL):**

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Members are encouraged to send your questions to PAL but are reminded that PAL is a practice resource and not a client problem resource. In other words, the PAL advisors are available to assist you with practice questions, but where you are seeking advice for a client situation, PAL cannot tell you what to do or provide you with legal advice. Members are also asked to manage your questions to PAL appropriately. Asking for urgent advice on the day of closing is problematic as responses may not be immediately forthcoming. Members should ensure that they have alternate resources available in such situations.

The Captive has asked us to also remind members that our lawyer, Quang Duong, is retained by the Captive to defend members sued for errors or omissions and to provide advice regarding file requests. Quang is not available to provide members with practice advice. Members are asked again not to contact Quang directly for advice. Please direct your questions to PAL or to the Captive. If you need advice because a client is pressuring you or to solve a client problem, you should develop a relationship with a local lawyer who you can turn to for ad hoc advice as needed.

3. **Practice Inspections**:

Practice Inspections continue to be conducted and submitted as scheduled. 69 Practice Inspections are assigned for this year plus 23 new notaries. The current practice inspectors are Joan Letendre, Daryl McLane, Tia Workman, Raman Sadhra and Irina Bartnik.

NOTARY EDUCATION PROGRAM

January 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1 NEW YEAR'S DAY	**2** NO CLASSES	**3**
4	**5** First Day Winter Session **Wills and Personal Planning** *Hilde Deprez and Vicki van As*	**6** **Wills and Personal Planning** *Hilde Deprez*	**7** **Wills and Personal Planning** *Hilde Deprez* *Guest Speaker – Amanda Winters*	**8** **Wills and Personal Planning** *Hilde Deprez*	**9** **Wills and Personal Planning** *Hilde Deprez* *Guest Speaker – Andrea Frisby*	**10**
11	**12** **Wills and Personal Planning** *Hilde Deprez and Vicki van As*	**13** **Wills and Personal Planning** *Hilde Deprez and Vicki van As*	**14** **Wills and Personal Planning** *Hilde Deprez and Vicki van As* *Guest Speaker – Dwight Dee*	**15** **Estate Administration** *Patricia Fedewich*	**16** **Estate Administration** *Patricia Fedewich*	**17**
18	**19** **Jurisprudence** *John Mayr*	**20** **Notarial Procedures** *Marny Morin*	**21** **Basic Conveyancing** *Nicola Bennett*	**22** **Basic Conveyancing** *Nicola Bennett*	**23** **ProSuite (Dye & Durham)** *Jennifer Whiting and Nicola Bennett*	**24**
25	**26** **Basic Conveyancing** *Nicola Bennett*	**27** **Basic Conveyancing** *Nicola Bennett*	**28** **Basic Conveyancing** *Nicola Bennett*	**29** **Property Irregularities** *Ron Usher* **Risk Management** *Matthew Morin*	**30** Last Day Winter Session **Review Will Assignment / Additional Q & A**	**31**

NOTARY EDUCATION PROGRAM

February 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 MENTORING PERIOD BEGINS	3 MENTORING	4 MENTORING	5 MENTORING	6 MENTORING	7
8	9 MENTORING	10 MENTORING	11 MENTORING	12 MENTORING	13 MENTORING	14
15	16 FAMILY DAY	17 MENTORING	18 MENTORING	19 MENTORING Evening Online Session Rimpy Sadhra	20 MENTORING	21
22	23 MENTORING	24 MENTORING	25 MENTORING	26 MENTORING Evening Online Session Rimpy Sadhra	27 MENTORING	28

NOTARY EDUCATION PROGRAM

March 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 MENTORING	3 MENTORING	4 MENTORING	5 MENTORING Evening Online Session	6 MENTORING	7
8	9 MENTORING	10 MENTORING	11 MENTORING	12 MENTORING	13 MENTORING	14
15	16 MENTORING (Spring Break)	17 MENTORING	18 MENTORING	19 MENTORING	20 MENTORING	21
22	23 MENTORING	24 MENTORING	25 MENTORING	26 MENTORING	27 MENTORING PERIOD ENDS	28
29	30 First Day Spring Session Wills Orals/Assessment Examiners	31 Wills Orals/Assessment Examiners				

NOTARY EDUCATION PROGRAM

April – May 1, 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 **Family Transfers** **ILA & Rules** *Peter Bjurman*	**2** **Morning** **Advanced Conveyancing** *Marny Morin and Rimpy Sadhra* **Afternoon** **Practice Advice Q & A**	**3** **NO CLASSES** **GOOD FRIDAY**	**4**
5	**6** **NO CLASSES** **EASTER MONDAY**	**7** **Advanced Conveyancing** *Marny Morin and Rimpy Sadhra* **Guest Speaker** **Jeremy Andersen**	**8** **Advanced Conveyancing** *Marny Morin and Rimpy Sadhra*	**9** **Advanced Conveyancing** *Rimpy Sadhra* **Guest Speakers** **David Watts & Tom Prasol**	**10** **Advanced Conveyancing** *Rimpy Sadhra and Hilde Deprez* **Guest Speakers** **Valerie Cole (LOTR)** **Larry Blaschuk (LTSA)**	**11**
12	**13** **Advanced Conveyancing** *Marny Morin and Rimpy Sadhra* **Guest Speaker** **Brett Horton**	**14** **Advanced Conveyancing** *Rimpy Sadhra* **Guest Speakers** **Raman Sadhra and Nelson Dias**	**15** **Electronic File Management and Trust Accounting** *Joan Letendre and Eric Fryatt* **Afternoon** **CRA Representative**	**16** **Cyber Security** *Matthew Morin*	**17** **NO CLASSES** **NEW NOTARY WORKSHOP** **BCNA WEEKEND**	**18** **BCNA WEEKEND**
19 **BCNA WEEKEND**	**20** **Small Business Conveyancing** *Patricia Fedewich*	**21** **Business & Practice** *Michelle Broughton* *Jonathan Wong*	**22** **Business & Practice** *Michelle Broughton* *Jonathan Wong*	**23** **Conveyancing Orals/Assessment** **Examiners**	**24** **Conveyancing Orals/Assessment** **Examiners**	**25**

April – May 1, 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27 Statutory Exam Prep	28 FINTRAC on ZOOM	29 FINTRAC on ZOOM	30 Statutory Exam Prep	May 1 Last Day Spring Session Statutory Exam Prep	

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To: Board of Directors
From: Marny Morin Secretary

Re: Secretary's report

Meeting Date: April 17, 2026

1. **Total Membership**: As of April 9, 2026

   Total Members– 464
   Full Active – 437
   Active but Roving – 5
   Non-Practicing – 22
   Suspended – 2 (Not included in Total)

2. **Resignation Application**: The Society has not received any resignation applications for approval.

3. **Deaths**: Former member from Vernon, Debra Burden passed away February 27, 2026. Debra was a member from 1991 until her retirement in 2016.

4. **Suspensions and Terminations:** Jagdish Singh was suspended pursuant to the Rules, effective March 4, 2025, for failing to obtain required education credits for 2023-2024 and in addition for failure to renew insurance as required. Since then, Mr. Singh has not made any effort to renew his insurance, obtain his insurance credits or to bring his membership into good standing. Jitendre Desai is suspended for failure to pay membership dues for 2025-2026.

5. **Authentications:** Members are encouraged to review the authentication procedures on the BC Government website at Guide to the Authentication of Documents - Province of British Columbia (gov.bc.ca)

Respectfully submitted:
Marny J. Morin,
Secretary

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Briefing Note

To: Board of Directors
From: John Mayr Executive Director

Re: Single Legal Regulator transition

Meeting Date: April 17, 2026

The next meeting of the Transitional Board and Transitional Indigenous Council is on April 13, 2026. At its previous meeting, the Transitional Board took the first steps in approving proposed rules. The proposed rules are published on the LPA transition website https://lpatransition.ca/news-documents/ with the proposed rules part of the information package of the March 2026 meeting.

Under the proposed consultation plan, the Transitional Board will be sharing the Rules and consulting with stakeholder groups including the SNPBC.
As a member of the Transitional Advisory Committee, I am deeply involved in the development of the rules.

A further significant package of proposed Rules will be considered at the April Meeting.

Of note, the appointed representative from the BC Paralegal Association, Elizabeth Kolias recently advised the Transition Board that the BCPA had elected a new president and that the organization would be appointing a new representative to the transitional board.

The Transitional Board has also amended the anticipated date of amalgamation from January 2027 to an ideal date of July 1, 2027 and a more realistic date of January 2028.

As of this wriiting, the parties continue to anticipate the decision of the chief justice of the Supreme Court of BC with respect to the litigation against the the government and the Legal Professions Act.

John Mayr
Executive Director.

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Briefing Note

To: Board of Directors
From: John Mayr Executive Director

Re: Combined Operations Working Group

Meeting Date: April 17, 2026

As part of the planning for amalgamation, the SNPBC and LSBC created the Combined Operations Working Group (COGS). The work of the group is to focus of the operational aspects of the transition to the Legal Professions Act. As previously discussed, the LPA provides for all assets, systems, and contracts (including employment) to transfer to Legal Professions BC.

The LSBC has a significantly more complex environment than the SNPBC with 14,000+ licensees and 250+ staff. This process is further complicated in that Legal Professions BC has no ability to direct the operations of either Society prior to amalgamation, yet there will need to be a high degree of planning for the transition. The responsibility to ensure that Legal Professions BC is an effective public interest regulator on the day of amalgamation falls to the teams at the SNPBC and LSBC.

To that end, the COGS has been working with a team at Cascadia Consulting in the identification of issues and the production of a plan since September 2025. With the extension of the deadline for full preparedness of the Rules (and amalgamation) there is some additional breathing room for the COGS.

Follows is a list of the main content areas that will require dedicated work and development.

1. Registration & Licensing
2. Trust Regulation
3. Complaints, Investigations & Disciplinary Functions
4. C&L, Prof. Dev., Practice Support, Practice Advice

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5. Indemnity / Insurance
6. HR
7. Finance
8. Operations
9. Communications
10. Privacy, Records & Info Mgmt
11. IT

Summary: Combined Operations Workplan							2026 (GANTT Chart)											
No Regrets Scope	Workstream	Sub stream	Milestone	Milestone Description	Start Period	End Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
In Scope, Partial, Defer			*Milestone*		Day-Month	Day-Month												
	1. Registration and Licensing																	
		Registration and Licensing																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Registration and Licensing function	01-Jan	31-Mar												
DEFER			Milestone	Implement a single R&L function	01-Apr	30-Jun												
		Registration Cycle																
DEFER			Milestone	Develop recommendations for potentially moving to common registration dates and billing cycles	01-Jul	15-Aug												
DEFER			Milestone	Develop recommendations for potential harmonization of registration fees	15-Aug	31-Oct												
		Public Registry																
PARTIAL			Milestone	Develop unified front-end for public registry, searchable by profession	01-Mar	31-May												
	2. Trust Regulation																	
		Trust Reporting																
PARTIAL			Milestone	Conduct current state mapping and identify opportunities to harmonize the Trust Reporting function	01-Jan	15-Mar												
PARTIAL			Milestone	Integrate Trust Reporting function for all licensees	15-Mar	30-Jun												
		Compliance and Audits																
PARTIAL			Milestone	Conduct current state mapping and identify opportunities to harmonize the Compliance and Audit function	01-Jan	15-Mar												
PARTIAL			Milestone	Harmonize compliance audit policies and processes where possible for all licensees	15-Mar	30-Jun												
		TAF																
IN SCOPE			Milestone	Harmonize the Trust Administration Fee (TAF)	01-Sep	30-Nov												
		Trust Resources for Licensees																
DEFER			Milestone	Update and harmonize licensee resources as needed (i.e., documentation, templates, courses)	01-Jul	31-Oct												
	3. Complaints																	
		Complaints																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Complaints function	01-Jan	31-Mar												
PARTIAL			Milestone	Implement unified process for managing complaints, triaging to profession-specific experts as required	01-Apr	31-Jul												
IN SCOPE			Milestone	Develop a single front-end user experience able to accept complaints for all professions	01-Aug	30-Nov												
		Investigations																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Investigations function	01-Feb	30-Apr												
PARTIAL			Milestone	Implement a unified process and single team managing investigations, triaging to experts as required	01-May	31-Jul												
		Custodianships																
PARTIAL			Milestone	Adjust Custodianship function to include paralegals, and any other essential changes	01-Aug	31-Oct												
		Unauthorized Practice																
PARTIAL			Milestone	Implement an Unauthorized Practice function that supports all licensees	01-Aug	30-Nov												
		Discipline																
IN SCOPE			Milestone	Conduct current state mapping and assess impacts of new Rules	01-Mar	30-Jun												
IN SCOPE			Milestone	Incorporate paralegals into one of the existing disciplinary processes, adjusting existing processes only as necessary	01-Jul	30-Jul												
		Tribunal																
PARTIAL			Milestone	Implement a harmonized Tribunal approach that includes all professions	01-Jul	30-Aug												
DEFER			Milestone	Confirm operational logistics for Tribunal	01-Sep	30-Nov												
		Additional Functions																
PARTIAL			Milestone	Determine how to carry on the work of the Law Society's Practice Standards Department	01-Jan	31-Mar												
PARTIAL			Milestone	Determine how to carry on the work of the Law Society's alternative programs	01-Jan	31-Mar												
	4. Prof Practice Ed																	
		Scope of Practice																
DEFER			Milestone	Align scope of practice with new LPA and rules, changing policies and processes as required	01-Jan	31-Jan												
		Standards																
PARTIAL			Milestone	Implement a single Code / Standards of Practice with profession-specific elements	01-May	30-Sep												

Summary: Combined Operations Workplan							2026 (GANTT Chart)											
No Regrets Scope	Workstream	Sub stream	Milestone	Milestone Description	Start Period	End Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
		Credentials & Licensing																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the administration of Credentials & Licensing suitability test and other credentialing duties	01-Jan	31-Mar												
IN SCOPE			Milestone	Implement a Credentials & Licensing suitability test that applies to all licensees	01-Apr	30-Jun												
DEFER			Milestone	Implement any other credentialing activities that will apply to all licensees	01-Aug	31-Oct												
		Entry Education Programs																
DEFER			Milestone	Highlight and identify entry education requirements for each profession and ensure continuation in new single regulator	01-Aug	01-Nov												
		Professional Development																
PARTIAL			Milestone	Develop recommendations for harmonizing professional development requirements	01-Oct	30-Nov												
		Practice Advice & Support																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Practice Advice and Practice Support function	01-Feb	30-Mar												
IN SCOPE			Milestone	Implement a single function and team supporting all licensees in practice advice	01-May	30-Jun												
	5. Insurance																	
		Insurance Delivery Model																
PARTIAL			Milestone	Implement a single insurance delivery model that supports all professions	01-May	31-Jul												
		Member Insurance Claims																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the claims handling process	01-Jan	31-Mar												
PARTIAL			Milestone	Implement a single claims handling process for all licensees	01-Apr	31-Jul												
		Corporate Insurance																
DEFER			Milestone	Implement corporate insurance policies for new organization	01-Aug	31-Dec												
		Transfer of Legal Entities																
DEFER			Milestone	Transition Captive to BCLIA	01-Aug	31-Oct												
	6. HR																	
		HR																
DEFER			Milestone	Current state mapping and identify opportunities to harmonize the HR function	01-Apr	30-May												
DEFER			Milestone	Develop future state vision and integration architecture for HR function	01-Jun	30-Jun												
DEFER			Milestone	Implement future state vision	01-Oct	30-Nov												
		Payroll																
PARTIAL			Milestone	Conduct current state mapping and identify opportunities to harmonize Payroll function	01-Apr	30-May												
DEFER			Milestone	Develop future state vision and integration architecture for Payroll function	01-Jun	30-Jun												
DEFER			Milestone	Implement future state vision	01-Oct	30-Nov												
		HR Policies																
PARTIAL			Milestone	Refine HR policies	01-Jan	31-Mar												
		Employee Handbook																
DEFER			Milestone	Develop one employee Handbook	01-Feb	30-Apr												
		Labour Relations																
PARTIAL			Milestone	Develop engagement strategy for union at Law Society	01-Feb	28-Feb												
		Staffing Plan																
PARTIAL			Milestone	Collect inputs for staffing plan with job descriptions	01-Mar	30-Apr												
DEFER			Milestone	Finalize staffing plan and job descriptions	15-Aug	15-Oct												
		Employee Contracts																
IN SCOPE			Milestone	Collect inputs for employee contracts	01-Mar	30-Apr												
DEFER			Milestone	Review and execute employee contracts	15-Aug	30-Nov												
		Organizational Design																
DEFER			Milestone	Develop an integrated organization chart that provides staff with clear roles in the organization	01-Jul	15-Sep												
		Compensation & Benefits																
PARTIAL			Milestone	Develop and implement total compensation and benefits strategy	01-Jul	30-Sep												
		Learning & Development																
DEFER			Milestone	Integrate staff learning and development processes and tools	01-Sep	30-Nov												
	7. Finance																	
		Finance Policies																
PARTIAL			Milestone	Develop a single set of Finance Policies	01-Jun	30-Sep												
DEFER			Milestone	Develop Delegation of Authority (DoA) Policies	01-Sep	31-Oct												
		Chart of Accounts																
DEFER			Milestone	Single Chart of Accounts	01-Jan	31-Mar												
		Finance Processes																

Summary: Combined Operations Workplan							2026 (GANTT Chart)											
No Regrets Scope	Workstream	Sub stream	Milestone	Milestone Description	Start Period	End Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Finance function	01-Jan	31-Mar												
IN SCOPE			Milestone	Develop future state vision and integration architecture for Finance function	01-May	30-Jun												
DEFER			Milestone	Implement future state vision	01-Jul	31-Jul												
IN SCOPE			Milestone	Inventory existing functions	01-Apr	15-May												
		Annual Compliance																
DEFER			Milestone	Prepare for Year-End	01-Jul	31-Jul												
DEFER			Milestone	Meet tax compliance & WorkSafe requirements	01-Aug	31-Oct												
		Miscellaneous																
IN SCOPE			Milestone	Conduct Real Estate inventory	01-Mar	30-Apr												
DEFER			Milestone	Conduct contracts inventory	01-Mar	30-Apr												
DEFER			Milestone	Conduct vendor inventory	01-Jan	28-Feb												
DEFER			Milestone	Plan for asset transfer	01-Aug	30-Sep												
		Banking																
PARTIAL			Milestone	Align Treasury & Banking	01-May	30-Jun												
		Budgeting and Forecasting																
DEFER			Milestone	Develop Budgets	01-Jun	31-Jul												
DEFER			Milestone	Develop Forecasts	01-Aug	15-Sep												
	8. Operations																	
		Office Space																
PARTIAL			Milestone	Identify space requirements	01-Mar	30-May												
DEFER			Milestone	Evaluate facility operations for the new organization	01-Jul	30-Sep												
		Moving Spaces																
DEFER			Milestone	Develop detailed move checklist	01-Oct	31-Dec												
	9. Communications																	
		Brand																
PARTIAL			Milestone	Develop new brand identity for regulator	01-Jun	15-Sep												
PARTIAL			Milestone	Develop new brand identity for Insurance entity	01-Jun	15-Sep												
PARTIAL			Milestone	Develop new brand identity for Tribunal	01-Jun	15-Sep												
PARTIAL			Milestone	Integrate new branding across new organization and corporate materials	15-Sep	30-Nov												
		Transition Website																
PARTIAL			Milestone	Determine need for an amalgamation / transition project website	01-Jan	28-Feb												
		LPBC Websites																
PARTIAL			Milestone	Launch new website with critical content to reflect new unified organization	01-Jul	31-Dec												
PARTIAL			Milestone	Launch new Insurance entity website with key content	01-Jul	31-Dec												
PARTIAL			Milestone	Launch new Tribunal entity website with key content	01-Jul	31-Dec												
		Social Media																
PARTIAL			Milestone	Create new social media properties for new organization	01-Oct	30-Nov												
		Intranet																
PARTIAL			Milestone	Develop and update intranet content	01-Sep	30-Nov												
	10. Privacy, Records																	
		FOI and FIPPA																
PARTIAL			Milestone	Develop an updated, unified process for handling FOI requests that arrive after Day 1	01-Oct	31-Dec												
		Privacy																
PARTIAL			Milestone	Complete the most urgent Privacy Impact Assessments	01-Oct	31-Dec												
PARTIAL			Milestone	Develop a harmonized approach to publishing disciplinary action decisions by licensees	01-Jun	31-Aug												
PARTIAL			Milestone	Develop a unified set of privacy and access processes	01-Jun	31-Aug												
		Records Management																
PARTIAL			Milestone	Maintain status quo on records management for custodianships at each Society (continue to be managed independently)	01-Sep	31-Oct												
	11. IT																	
		HR																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the HR function	01-Apr	30-May												
PARTIAL			Milestone	Develop future state vision and integration plan for HR function	01-Jun	30-Jun												
DEFER			Milestone	Implement future state vision	01-Oct	30-Nov												
		Payroll																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize Payroll function	01-Apr	30-May												
PARTIAL			Milestone	Develop future state vision and integration plan for Payroll function	01-Jun	30-Jun												
DEFER			Milestone	Implement future state vision	01-Oct	30-Nov												

Summary: Combined Operations Workplan							2026 (GANTT Chart)											
No Regrets Scope	Workstream	Sub stream	Milestone	Milestone Description	Start Period	End Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
		Finance																
IN SCOPE			Milestone	Conduct current state mapping and identify opportunities to harmonize the Finance function	01-Jan	31-Mar												
PARTIAL			Milestone	Develop future state vision and integration plan for Finance function	01-May	30-Jun												
DEFER			Milestone	Implement future state vision	01-Jul	31-Jul												
		Public Registry																
PARTIAL			Milestone	Develop a clear future state vision for Public Registry and a detailed plan for migrating to new systems	01-Jun	30-Sep												
		Websites																
PARTIAL			Milestone	Develop 3 new websites (LPBC, Insurance entity, and Tribunal), with dynamic forms, active portal, and integrated with backend systems (e.g. CRMs)	01-Jun	30-Nov												
		Internal Communications Systems																
PARTIAL			Milestone	Develop a clear future state vision for internal communication tools	01-Sep	31-Dec												
		Core Regulatory Systems (CRM, Document Management, LMS)																
IN SCOPE			Milestone	Conduct current state mapping of processes supported by core regulatory systems	01-Jan	31-May												
		IT Assets																
PARTIAL			Milestone	Conduct inventory of hardware and licenses	01-Sep	31-Oct												
		User Access																
PARTIAL			Milestone	Manage user access	01-Oct	30-Nov												
		Intranet																
PARTIAL			Milestone	Update Intranet, in collaboration with Communications	01-Aug	30-Dec												

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Registration and Licensing		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column F)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Registration and Licensing									
IN SCOPE	**YES**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Registration and Licensing function**			01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Complete current state process mapping for the registration and licensing activities	*Including enrollment processes, annual fee billing, applications such as: LSAP, Call & Admission, Transfers, Status changes (non-practising, retired, terminations), Return to Practice, Reinstatement, Indemnity changes, Temporary Articles.*						
IN SCOPE		Activity	Collect paralegal requirements for function	*Determine which of the 2 current CRMs best meet the needs for paralegals*						Paralegals
IN SCOPE		Activity	Collect all registrant and licensing forms and create an inventory							
IN SCOPE		Activity	Consider digitization of all registrant files to permit uniform storage of all records for all licensees							
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)	*Consider billing implications, other regulatory functions, integrations to CRMs, etc.*						
DEFER	**DEFER**	**Milestone**	**Implement a single R&L function**			01-Apr	30-Jun	Pre-Day 1		
DEFER		Activity	Develop action plan for onboarding paralegals to identified CRM							
DEFER		Activity	Develop recommendations for actioning results of impact analysis to ensure smooth transition to a single organization with 2 CRMs on Day 1	*e.g. will all analysts deal with and respond to questions and matters relating to all categories of licensees, or will there be separate resources dedicated to the different categories of licensees and using separate CRMs?*						
DEFER		Activity	Implement recommendations and plan for pre-Day 1 amalgamation of R&L function							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
DEFER		Activity	Analyze inventory of registration and licensing forms and update or retire as needed with new organizational branding	*SOPs, procedure manuals, etc.*						
	Registration Cycle									
DEFER	**DEFER**	**Milestone**	**Develop recommendations for potentially moving to common registration dates and billing cycles**	*Direction received from COG so far is to implement the recommendations after Day 1*		01-Jul	15-Aug	Pre-Day 1		
DEFER		Activity	Review current dates and cycles and understand rationale for each approach							
DEFER		Activity	Identify options for harmonizing, such as one common registration date and billing cycle)							
DEFER		Activity	Conduct impact analysis on identified options							
DEFER		Activity	Determine registration and billing cycle for regulated paralegals							
DEFER		Activity	Develop recommendations for harmonizing registration dates and billing cycles to be implemented after Day 1							
DEFER	**DEFER**	**Milestone**	**Develop recommendations for potential harmonization of registration fees**	*Direction received from COG so far is to implement the recommendations after Day 1;* *Coordinate with Finance workstream as needed*		15-Aug	31-Oct	Pre-Day 1		
DEFER		Activity	Review current registration fees, rationale, and financial implications							
DEFER		Activity	Review short-term forecast from the Finance workstream for the number of all licensees							Finance Inputs
DEFER		Activity	Develop a financial model in coordination with Finance workstream to test a fee schedule for paralegals							
DEFER		Activity	Coordinate with Finance workstream to propose fee schedule for regulated paralegals							
DEFER		Activity	Finalize fee schedule for paralegals							
DEFER		Activity	Coordinate with the Finance workstream to propose a new fee schedule and implementation recommendations for after Day 1 with consideration as to whether fees should be harmonized across all licensees							
	Public Registry									
PARTIALLY	**PARTIALLY**	**Milestone**	**Develop unified front-end for public registry, searchable by profession**			01-Mar	31-May	Pre-Day 1		IT
IN SCOPE		Activity	Review existing public registry requirements for each licensee category	*See section 61 of the LPA and any additional information that may be required under section 66*						
IN SCOPE		Activity	Review new rules for any new requirements; identify requirements for regulated paralegals							Rules
DEFER		Activity	Coordinate with IT workstream to assess and determine harmonized approach for front-end of registry, across all licensee categories							IT
DEFER		Activity	Coordinate with IT workstream on development of single user experience for public registry	*Connected on the backend to the two existing CRMs*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Trust Regulation		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Trust Reporting									
PARTIAL	**PARTIAL**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Trust Reporting function**			01-Jan	15-Mar	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping of trust reporting processes across both societies	*Including IT systems used at each stage*						
DEFER		Activity	Determine paralegal scope of practice as related to trusts and any paralegal requirements							Paralegals
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)							
PARTIAL	**PARTIAL**	**Milestone**	**Integrate Trust Reporting function for all licensees**			15-Mar	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Collect all rules, policies, and processes, related to trust reporting for all licensees	*Including reporting requirements, suspension provisions, late fees, unclaimed trust money, etc.*						Rules
IN SCOPE		Activity	Determine which rules, policies, and processes can be integrated and if any need to remain profession-specific							
DEFER		Activity	Harmonize the trust reporting function via rules, policies, and processes revisions as identified							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Compliance and Audits									
PARTIAL	**PARTIAL**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Compliance and Audit function**			01-Jan	15-Mar	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping of Compliance and Audit processes across both societies	*Including IT systems used at each stage*						
DEFER		Activity	Determine paralegal requirements for compliance and audits							Paralegals
DEFER		Activity	Conduct impact analysis on file privilege issue and Fintract reporting responsibilities							
IN SCOPE		Activity	Determine if notary auditing can be brought in-house							
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)							
PARTIAL	**PARTIAL**	**Milestone**	**Harmonize compliance audit policies and processes where possible for all licensees**			15-Mar	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Collect all rules, policies, and procedures related to compliance and audits for lawyers and notaries							Rules
IN SCOPE		Activity	Determine which rules, policies, and processes can be integrated and if any need to remain profession-specific							
DEFER		Activity	Harmonize compliance and audits via rules, policies, and processes revisions as identified							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	TAF									
IN SCOPE	**IN SCOPE**	**Milestone**	**Harmonize the Trust Administration Fee (TAF)**			01-Sep	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Review TAF rules, policies, and procedures							Rules
IN SCOPE		Activity	Conduct impact analysis on harmonizing TAF							
IN SCOPE		Activity	Develop and implement recommendations to harmonize TAF, including a transition period for licensees							
IN SCOPE		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Trust Resources for Licensees									
DEFER	**DEFER**	**Milestone**	**Update and harmonize licensee resources as needed (i.e., documentation, templates, courses)**			01-Jul	31-Oct	Pre-Day 1		
DEFER		Activity	Collect inventory of all trust resources for licensees (documentation, templates, courses)							
DEFER		Activity	Analyze inventory to determine what resources need to be retired vs. updated vs. status quo other than a branding update							
DEFER		Activity	Update identified resources							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Complaints, Investigations & Disciplinary Functions		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1, Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Complaints									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Complaints function**			01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Conduct current state business process mapping for complaints management process at each society, identifying differences across the two societies.	*Specify IT systems and decision-making authorities as they align to different stages of the complaints process (for example, where Ex Dir will now have decision-making authority, Benchers won't exist, Tribunal will hold certain authorities in the interim or beyond)*						Rules
IN SCOPE		Activity	Conduct impact assessment to confirm whether decision-making authority around complaints process is changing and any requirements to support changes	*Context: Under new LPA, several Committees will no longer exist (Practice Standards Committee, Complainants' Review Committee)*						
IN SCOPE		Activity	Review new rules and identify if / where they will impact complaints management process							Rules
IN SCOPE		Activity	Clarify thresholds for classifying as a complaint that must be investigated, and if it will differ by profession	*Rules may dictate thresholds. Example of differences that may be considered across professions: 60% of complaints received are not within jurisdiction of Notaries Act (SNPBC does not handle theft, financial crimes, damages, notaries making a mistake on a*						Rules
IN SCOPE		Activity	Identify requirements for accepting complaints related to paralegals, and flag where they are similar or distinct from existing process for lawyers or notaries							
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)							
PARTIAL	**PARTIAL**	**Milestone**	**Implement unified process for managing complaints, triaging to profession-specific experts as required**			01-Apr	31-Jul	Pre-Day 1		
IN SCOPE		Activity	Confirm which licensee types will review which types of complaints	*e.g. align team members with expertise in certain licensees types to those complaints;* ***ADD THIS ACTIVITY TO INVESTIGATIONS*** *(duplicate it)*						
IN SCOPE		Activity	Develop a unified complaints process that includes all professions, triaging as required							
IN SCOPE		Activity	Align on the complaint types that will fall within the jurisdiction of the new regulator	*This currently differs across SNPBC and LSBC, for example SNPBC does not handle theft, financial crimes, damages, notaries making a mistake on a document.*						
IN SCOPE		Activity	Review current categorizations by both societies and align on a standard complaint classification system for entry into Records Management system							Decision around degree of process harmonization
IN SCOPE		Activity	Align SLAs for managing each stage of the process	*LSBC currently has SLAs, but new anticipating new practice directives / rules setting out timelines for progression of cases, Committee schedule*						Decision around degree of process harmonization
IN SCOPE		Activity	Align on common intake channels for complaints about sexual misconduct, harassment or discrimination	*Confirm if continue to use dedicated phone lines / emails in use by LSBC*						
IN SCOPE		Activity	Clarify and align on practices around confidentiality, disclosure and privacy at various stages of intake and complaints process.							Rules will influence?
IN SCOPE		Activity	Confirm process for managing SNPBC and LSBC complaints received before Day 1							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
IN SCOPE	**IN SCOPE**	**Milestone**	**Develop a single front-end user experience able to accept complaints for all professions**			01-Aug	30-Nov	Pre-Day 1		IT
IN SCOPE		Activity	Develop a single complaints form for all professions (a uniform front-end user experience), with any profession-specific elements specified							
IN SCOPE		Activity	Enhance Complaints Portal (currently under development) to include a common set of requirements that support all professions	**This work will be done in collaboration with IT workplan and changes to website and portal.* *Main goal of portal under development: Make it easier for complainants to navigate our website and to communicate with us after they make a complaint*						
	Investigations									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Investigations function**			01-Feb	30-Apr	Pre-Day 1		
IN SCOPE		Activity	Review current state process for investigations at LSBC and SNPBC	*This cuts across the follow functions: SNPBC (Practice Inspections), LSBC (Investigations, Monitoring & Enforcement; Forensic Accounting)*						
IN SCOPE		Activity	Compare evidence handling policies and procedures across the two organizations, and potential impacts of different standards on future cases	*Evidence handling is not legislated, but handled according to each Society's internal policies*						
IN SCOPE		Activity	Confirm any rule impacts on investigations process, including whether regulator will have the same investigative abilities and powers re: licensee's conduct							Rules
IN SCOPE		Activity	Confirm any paralegal-specific requirements for investigations	***ADD NEW ACTIVITY: Privelege issue - Confirm impact of privelege issue regarding Notary and Paralegal clients (AND DUPLICATE THIS for COMPLAINTS)***						Paralegals
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)							
PARTIAL	**PARTIAL**	**Milestone**	**Implement a unified process and single team managing investigations, triaging to experts as required**			01-May	31-Jul	Pre-Day 1		
IN SCOPE		Activity	Develop a unified approach to managing investigations, triaging to profession-specific experts as needed	*Identify any profession-specific differences for investigations process, such as disclosure, degree to which paperwork can be reviewed, and who will conduct investigations into paralegals.*						
IN SCOPE		Activity	Align on what will trigger an inspection or practice review across professions (i.e. will we continue routine practice inspections for all Notaries or only on as-needed basis)	*If moving away from routine practice inspections for notaries every 3-4 years, align with Professional Development function on any additional educational support for notaries (i.e. practice inspections serves an educational purpose as well)*						
IN SCOPE		Activity	Develop a unified approach for Trust Account audits (including forensic accounting, SNPBC audits)	***This belongs with trust regulation***						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Custodianships									
PARTIAL	**PARTIAL**	**Milestone**	**Adjust Custodianship function to include paralegals, and any other essential changes**			01-Aug	31-Oct	Pre-Day 1		
IN SCOPE		Activity	Confirm any rule impacts on custodianship management	*The new Act does not change how custodianships are managed, but confirm if any Rules will impact*						Rules
IN SCOPE		Activity	Confirm any paralegal-specific requirements for custodianships							Paralegals
IN SCOPE		Activity	Confirm if custodianships will need to be managed by their respective professions	*i.e. only a Notary would take on custodianship of a notary's practice*						
IN SCOPE		Activity	Ensure this function is in place for Day 1 for each profession	*Ensure ability to go to court on a rush basis for custodianships as of Day 1*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Unauthorized Practice									
PARTIAL	**PARTIAL**	**Milestone**	**Implement an Unauthorized Practice function that supports all licensees**			01-Aug	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Confirm any rule impacts on how Unauthorized Practice is managed	*The new Act does not change how unauthorized practice is managed, but confirm if any Rules will impact*						
IN SCOPE		Activity	Identify scenarios that may occur with paralegals joining as members, and any unique requirements they may have							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
IN SCOPE		Activity	Adjust the existing Unauthorized Practice processes to include any paralegal requirements	*Confirm if aligning paralegals to LSBC or SNPBC process*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Discipline									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and assess impacts of new Rules**			01-Mar	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping for Discipline management process at each society and identify differences across the two societies							
IN SCOPE		Activity	Specify decision-making authorities as they align to different stages of the Discipline process							
IN SCOPE		Activity	Conduct mapping of disciplinary outcomes / penalties by infraction across professions	*Notaries Act developed in 1980s, and maximum penalty amounts of $5K is no longer that significant (New Act may prescribe). Additionally, discipline process is expensive / time-consuming and delays protecting the public. SNPBC: Within boundaries of Notaries Act, they have been exploring options, such as Agreed Statement of Fact (e.g. Could include promises to get Trust Accounting in order, and then if they break those promises they go to Discipline). LSBC: Has established various pathways to resolving complaints, including Alternative Discipline Committee, Discipline Consent Agreements, Administrative Penalty Program.*						
IN SCOPE		Activity	Review new rules and identify where they will impact Discipline process, including decision-making authorities							Rules
IN SCOPE		Activity	Confirm governance structure of Committees, including profession-specific composition of Committees / adjudication panels							Rules
IN SCOPE		Activity	Conduct impact assessment of new LPA including how definition of "professional misconduct" will impact discipline processes							
IN SCOPE		Activity	Conduct impact assessment to confirm where decision-making authority is changing and any requirements to support changes							
IN SCOPE	**IN SCOPE**	**Milestone**	**Incorporate paralegals into one of the existing disciplinary processes, adjusting existing processes only as necessary**			01-Jul	30-Jul	Pre-Day 1		Paralegals, Rules
IN SCOPE		Activity	Identify requirements related to paralegals, and the existing disciplinary process they best align with (and any adaptations required to support paralegal requirements)							
IN SCOPE		Activity	Integrate paralegals into one of the existing disciplinary processes, adapting as required to meet their requirements							
IN SCOPE		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Tribunal									
PARTIAL	**PARTIAL**	**Milestone**	**Implement a harmonized Tribunal approach that includes all professions**			01-Jul	30-Aug	Pre-Day 1		
IN SCOPE		Activity	Review current state process for Tribunal at LSBC							
IN SCOPE		Activity	Conduct impact assessment of new Tribunal rules	*Tribunal Rules to be made by Interim Tribunal Chair, and must include outreach with Indigenous Council and other stakeholders. Have heard that the Interim Tribunal Chair may be hired 6 months before Day 1 (will be tough timeline to be ready for Day 1).*						Hiring of Interim Tribunal Chair. Rules.
DEFER		Activity	Adjust existing Tribunal process to include notaries and paralegals	*Identify any profession-specific differences in the use cases that will be seen by the Tribunal*						
DEFER		Activity	Adjust Tribunal process to align with new adjudicator panel composition (panel composition dictated by new LPA)	*Recruiting and training new tribunal members will require some lead time. Will need to determine earliest timing of licensing some 'licenses paralegals' so they can participate in Tribunal asap.*						
DEFER		Activity	Adjust process to include changing authorities for imposing suspension and disbarments, conditions							
DEFER		Activity	Adjust process to account for new appeal process options							
DEFER	**DEFER**	**Milestone**	**Confirm operational logistics for Tribunal**			01-Sep	30-Nov	Pre-Day 1		
DEFER		Activity	Confirm how operational expenses will be divided and provided (e.g. HR, Finance, Admin, Operations) given the Tribunal's independence							
DEFER		Activity	Confirm new operating name of Tribunal							
DEFER		Activity	Confirm if new web domain of entity website required							
DEFER		Activity	Confirm physical location of Tribunal	*The possibility of repurposing the Notaries Societies office space has been suggested as a possibility for consideration.*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Additional Functions									
PARTIAL	**PARTIAL**	**Milestone**	**Determine how to carry on the work of the Law Society's Practice Standards Department**	*New milestone added in January 2026*		01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping of the Practice Standards Department work							
IN SCOPE		Activity	Analyze LPA to understand how Department's work will be done differently in the new organization							
DEFER		Activity	Develop recommendations on how to continue this work to share with CEO							
DEFER		Activity	Determine if there needs to be Board approval or other engagement to move forward with implementing the recommendations							
PARTIAL	**PARTIAL**	**Milestone**	**Determine how to carry on the work of the Law Society's alternative programs**	*New milestone added in January 2026*		01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping of the ADR and Administrative Penalty Program work							
IN SCOPE		Activity	Analyze LPA to understand if there are impacts on how this work may need to be done differently in the new organization							
DEFER		Activity	Develop recommendations on how to continue this work to share with CEO							
DEFER		Activity	Determine if there needs to be Board approval or other engagement to move forward with implementing the recommendations							

Combined Operations Workplan									
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
C&L, Prof. Dev., Practice Support, Practice Advice		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Scope of Practice								
DEFER (until paralegal information comes out)	**DEFER**	**Milestone**	**Align scope of practice with new LPA and rules, changing policies and processes as required**		01-Jan	31-Jan	Pre-Day 1		Paralegals, Rules
DEFER (until paralegal information comes out)		Activity	Review new rules to confirm scope of practice for each licensee category						
DEFER (until paralegal information comes out)		Activity	Determine impacts of scope of practice to existing processes, policies, etc.						
DEFER (until paralegal information comes out)		Activity	Ensure impacts have been addressed in combined operations workplan; amend plan as required						
	Standards								
PARTIAL (Yes to start until paralegal information is available; Does the Transition Board or the Societies own the Code?)	**PARTIAL**	**Milestone**	**Implement a single Code / Standards of Practice with profession-specific elements**		01-May	30-Sep	Pre-Day 1		Paralegals, Rules
IN SCOPE		Activity	Collect all Standards and Codes from LSBC and NPBC, and define profession-specific standards/code of practice						
IN SCOPE		Activity	Review scope of matters that fall within standards, how new standards are recommended, etc.						
IN SCOPE		Activity	Conduct analysis of all Standards and Codes and related programs						
DEFER		Activity	Identify if any standards will be impacted by new rules and/or LPA						Rules
DEFER		Activity	Identify the standards that heavily impact other regulatory processes, such as complaints, investigations, and discipline, and flag for other workstreams to collaborate on changes						
DEFER		Activity	Define and implement a single code of practice standards for all licensees, with profession-specific standards included						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*					
	Credentials & Licensing								
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the administration of Credentials & Licensing suitability test and other credentialing duties**	*Coordinate with Registration and Licensing workstream*	01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Identify the full set of credentialing duties of C&L, in addition to the suitability test						
IN SCOPE		Activity	Complete current state process mapping for the process of administering credentials and licensing suitability tests and other credentialing duties						
IN SCOPE - when available		Activity	Collect paralegal requirements for function						Paralegals
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)						
IN SCOPE	**IN SCOPE**	**Milestone**	**Implement a Credentials & Licensing suitability test that applies to all licensees**		01-Apr	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Assess impacts of new Rules and case law on credentials and licensing						Rules
IN SCOPE		Activity	Complete baseline harmonization of Society-delivered training and assessments	*Post Day- 1, would harmonize remaining aspects of Society-delivered training and assessments (can do skills-based harmonization but scope of practice will always be distinct)*					
IN SCOPE		Activity	Review associated fees for potential harmonization	*While the direction is to retain the status quo, issues of fairness may arise if the different professions have different fees for exams, assessments, etc.*					
IN SCOPE		Activity	Adapt credentials & Licensing suitability test so that it applies to all licensees						
DEFER	**DEFER**	**Milestone**	**Implement any other credentialing activities that will apply to all licensees**		01-Aug	31-Oct	Pre-Day 1		
DEFER		Activity	Harmonize any additional duties across all professions based on the set of credentialing duties outlines.						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*					
	Entry Education Programs								
DEFER / LEAVE IN AUGUST	**DEFER**	**Milestone**	**Highlight and identify entry education requirements for each profession and ensure continuation in new single regulator**	*Post Day- 1, harmonize current entry education programs (depends on Transitional Board)*	01-Aug	01-Nov	Pre-Day 1		Paralegals
DEFER / LEAVE IN AUGUST		Activity	Define pre-entry education requirements for paralegals to join the profession						
DEFER / LEAVE IN AUGUST		Activity	Determine regulatory assessment of pre-entry education for paralegals						
DEFER / LEAVE IN AUGUST		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*					

Combined Operations Workplan									
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
	Professional Development								
PARTIAL	**PARTIAL**	**Milestone**	**Develop recommendations for harmonizing professional development requirements**	*Post Day-1, implement harmonized professional development requirements after a transition period*	01-Oct	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Conduct analysis of requirements and policies related to professional development / continuing education for lawyers and notaries						
IN SCOPE		Activity	Review new rules for continuing education requirements						
DEFER / Keep at Oct		Activity	Develop paralegal professional development requirements						Paralegals
DEFER / Keep at Oct		Activity	Compare and determine which requirements can be harmonized across professions						
DEFER / Keep at Oct		Activity	Develop recommendations to harmonize professional development requirements	*Hours / credits (easier to harmonize), assess and harmonize mandatory training for all licensees. Cover required topics of education, deadlines/annual cycles, tracking processes, etc.*					
DEFER / Keep at Oct		Activity	Determine a transition period and related policies and processes needed to transition to new requirements						
	Practice Advice & Support								
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Practice Advice and Practice Support function**		01-Feb	30-Mar	Pre-Day 1		
IN SCOPE		Activity	Complete current state process mapping for the processes involved in delivering Practice Advice and Practice Support						
IN SCOPE - when available		Activity	Collect paralegal requirements for function						Paralegals
IN SCOPE		Activity	Identify opportunities based on current state mapping to harmonize processes (while maintaining two CRM systems)						
IN SCOPE	**IN SCOPE**	**Milestone**	**Prepare for a single function and team supporting all licensees in practice advice**	*Depends on Code, Rules*	01-May	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Collect all rules, policies, and procedures related to practice advice & support for lawyers and notaries						Rules
IN SCOPE		Activity	Review confidentiality, data collected, and related practices for both lawyers and notaries when leveraging practice advice and support						
IN SCOPE		Activity	Identify top use cases of practice advice support for lawyers and notaries, including example responses						
IN SCOPE		Activity	Define process to stream practice support by licensee types / to experts starting on Day 1						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*					
DEFER		Activity	Implement the single function				Post-Day 1		

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Indemnity / Insurance		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Insurance Delivery Model									
PARTIAL	**PARTIAL**	**Milestone**	**Implement a single insurance delivery model that supports all professions**			01-May	31-Jul	Pre-Day 1		
IN SCOPE		Activity	Review current insurance delivery models at each society							
IN SCOPE - could make recs to Transitional Board (limits, details etc usually not affected by rules)		Activity	Assess impact of new rules (on coverage limits, other)	*As of Sept 2025, no additional impacts from Rules are anticipated.*						Rules
IN SCOPE - same coverage as lawyers but for their scope		Activity	Identify paralegal requirements for insurance coverage	*And how they may differ from lawyer's coverage under LIF.*						Paralegals, Rules
IN SCOPE - they decided they are going to have a finance and audit committee - and they will have a sub-committee on indemnity		Activity	Confirm governing body that will approve changes to insurance coverage limits and new Committee structure as dictated by the rules	*A Transitional Board Rule on Committee structures in the new organization may specify how coverage limits could be modified*						Rules
IN SCOPE - starting soon		Activity	Investigate market options for notaries' and paralegals' ability to secure excess coverage independently	*Notaries have struggled in the past to secure excess coverage independently*						
DEFER		Activity	Develop and implement the structure of a single insurance program (a unified approach to coverage limits and membership fees)	*LSBC members pay $1,800 annually for LIF; SNPBC members pay $3,000 annually and additional monthly fees based on transaction volumes (an average of $7,000 annually by notary). Consider any differences for part-time vs. full-time notaries.*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Member Insurance Claims									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the claims handling process**			01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Complete current state process mapping for the claims management process at each Society	*From claims intake to resolution, identifying distinctions between the two societies along the journey. Specify decision-making authorities at each stage and technology tools used at each step*						
IN SCOPE		Activity	Collect paralegal requirements for function							Paralegals
IN SCOPE		Activity	Estimate effort required based on current state mapping to align to COG direction of unifying claims handling process	*Including any IT system or process changes required to support the direction provided by the COG*						
IN SCOPE		Gate	Confirm direction for claims handling function							
PARTIAL	**PARTIAL**	**Milestone**	**Implement a single claims handling process for all licensees**			01-Apr	31-Jul	Pre-Day 1		
IN SCOPE - no rules on claims process		Activity	Assess impacts of new rules on claims process	*Related to claims approval (decision-making authorities, size of claim payouts that can be approved by a single person/role) and any impacts on the claims handling process overall*						Rules
IN SCOPE - we're taking all risks and same fee		Activity	Confirm any new risks presented by amalgamation of the three professions, and assess impacts of those risks on insurance coverage needs							
IN SCOPE - should be no new issues		Activity	Identify changes to the areas of advice that staff may be called upon to provide	*Whether cross-profession advice or around new risks presented due to amalgamation*						
IN SCOPE - dependent on mapping		Activity	Refine future state vision for a single claims handling process for all licensees (including paralegals) based on assessment of impacts, with a consistent and unified user experience							
IN SCOPE - deterine whether to bring in-house claims that are being managed by outside counsel		Activity	Confirm approach for ensuring continuity of all open claims for lawyers and notaries	*Confirm that claims begun before Day 1 will be managed as per the policies and processes prior to Day 1 (or the threshold in the process by which they will be managed by the new policy / process)*						
IN SCOPE- PA provides ethics advice and LIF provides advice on advice that prevents claims and losses - very little overlap, though LIF funds the PA function		Activity	Clarify roles between Insurance function and Practice Advice function							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Corporate Insurance									

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
DEFER - Critical Path, but can defer for now (starts later in the timeline)	**DEFER - Critical Path, but can defer for now (starts later in the timeline)**	**Milestone**	**Implement corporate insurance policies for new organization**			01-Aug	31-Dec	Pre-Day 1		
DEFER			Collect active corporate/D&O insurance policies from each society							Go to market for insurance quote 90 days prior to Day 1.
DEFER			Determine insurance implications, if any, for Paralegals							
DEFER			Determine insurance requirements for new organization							
DEFER - this will be key - LIF's broker is Marsh, SNPBC broker? Same broker?			Select insurance broker							
DEFER			Provide policies to selected broker for review							
DEFER			Review policies and develop comprehensive set of new insurance policies for Day 1 *(Broker responsible)*							
DEFER			Receive quotes for insurance policies *(Broker responsible)*							
DEFER			Execute insurance policies *(New organization responsible)*							
	Transfer of Legal Entities									
DEFER	**DEFER**	**Milestone**	**Transition Captive to BCLIA**			01-Aug	31-Oct	Pre-Day 1		
DEFER		Activity	Investigate what is required to transition Captive to BCLIA and outline steps to transition							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
HR		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1, Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration
	HR									
DEFER	**DEFER**	**Milestone**	**Current state mapping and identify opportunities to harmonize the HR function**	*This is a business and technical project, and collaboration between HR and IT workstreams will be necessary*		01-Apr	30-May	Pre-Day 1		
DEFER		Activity	Current state mapping of HR business processes for each society							
DEFER		Activity	Map current state architecture for each society, including IT systems being used, high-level architecture of systems, data flows, and integrations between systems	**CONSIDER MERGING WITH HR POLICIES*						
DEFER		Activity	Identify requirements for both societies							
DEFER		Activity	Conduct gap analysis to assess how current systems are meeting SNPBC, LSBC, and paralegal requirements, including identification of pain points	*Assumption is that the new regulator is not moving to a net new system*						
DEFER	**DEFER**	**Milestone**	**Develop future state vision and integration architecture for HR function**			01-Jun	30-Jun	Pre-Day 1		HRIS single system IT project
DEFER		Activity	Develop future state vision, including identification of system to be used							
DEFER		Activity	Develop implementation plan for migrating existing processes to new system, including effort required, third party support needed, and cost implications							
DEFER	**DEFER**	**Milestone**	**Implement future state vision**			01-Oct	30-Nov	Pre-Day 1		
DEFER		Activity	Migrate and onboard all staff to selected HR system	*Require org chart and position composition prior to upload*						
DEFER		Activity	Consolidate legacy HR data files into single HRIS or other system							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc. - coordinate with HR policies milestone*						
	Payroll									
PARTIAL	**PARTIAL**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize Payroll function**	*This is a business and technical project, and collaboration between HR and IT workstreams will be necessary*		01-Apr	30-May	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping of business processes for Payroll across both societies	*E.g. understand how payroll and expenses are managed*						
IN SCOPE		Activity	Assess current systems for storing employee data (i.e. HRIS and other files, systems, etc.)							
IN SCOPE		Activity	Map current state architecture for each society, including IT systems being used, high-level architecture of systems, integrations between systems							
IN SCOPE		Activity	Identify requirements for both societies							
DEFER		Activity	Identify paralegal requirements							
DEFER		Activity	Conduct gap analysis to assess how current systems are meeting SNPBC, LSBC, and paralegal requirements, including identification of pain points	*Assumption is that the new regulator is not moving to a net new system*						
DEFER	**DEFER**	**Milestone**	**Develop future state vision and integration architecture for Payroll function**			01-Jun	30-Jun	Pre-Day 1		
DEFER		Activity	Develop implementation plan for migrating existing processes to new system, including effort required, third party support needed, cost implications and how to manage payroll financial components in the selected ERP							
DEFER	**DEFER**	**Milestone**	**Implement future state vision**			01-Oct	30-Nov	Pre-Day 1		
DEFER		Activity	Migrate and onboard all staff to selected Payroll system							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc. - coordinate with HR policies milestone*						
	HR Policies									
PARTIAL	**PARTIAL**	**Milestone**	**Refine HR policies**			01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Collect all HR policies and create an inventory	*Coordinate with payroll*						
DEFER		Activity	Analyze HR policies inventory to understand differences							
DEFER		Activity	Determine which policies can be retired, integrated, etc.							
DEFER		Activity	Update policies and other governing documents as necessary							
	Employee Handbook									
DEFER	**DEFER**	**Milestone**	**Develop one employee Handbook**	*Consider the need for an Indigenous consultant and/or an external legal review*		01-Feb	30-Apr	Pre-Day 1		
DEFER		Activity	Identify HR policies critical for Day 1 for all employees (i.e. code of conduct, expenses, travel, remote/hybrid work, vacation and sick leave, etc.) from HR policy inventory							
DEFER		Activity	Create or update critical policies as needed before including in an Employee Handbook							
DEFER		Activity	Seek external legal and/or indigenous review of all policies, as required							
DEFER		Activity	Draft and design new Employee Handbook							
	Labour Relations									
PARTIAL	**PARTIAL**	**Milestone**	**Develop engagement strategy for union at Law Society**			01-Feb	28-Feb	Pre-Day 1		
IN SCOPE		Activity	Confirm with LSBC HR team information requirements, timing, and roles and responsibility for developing and delivering the strategy and collect relevant documentation (i.e. collective agreement)							
IN SCOPE		Activity	Determine if external employment counsel is needed to coordinate with union							
DEFER		Activity	Identify critical points of engagement and requirements and their impact on related milestones (i.e. change of employer notice, etc.)							
DEFER		Activity	Develop strategy for engaging with the union and coordinate with other workstreams as needed							
	Staffing Plan									
PARTIAL	**PARTIAL**	**Milestone**	**Collect inputs for staffing plan with job descriptions**			01-Mar	30-Apr	Pre-Day 1		
IN SCOPE		Activity	Collect all current job descriptions and collective agreement(s)							
DEFER		Activity	Identify net new roles that will be needed post-amalgamation by consulting with appropriate staff	*Consider resources and capacity needed to serve regulated paralegals*						
DEFER		Activity	Create inventory of current and net new job descriptions; organize by category							
DEFER	**DEFER**	**Milestone**	**Finalize staffing plan and job descriptions**			15-Aug	15-Oct	Pre-Day 1		Organizational Design

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
DEFER		Activity	Develop staffing plan that outlines all identified job roles, harmonized pay bands, and hiring plans	*Align staffing plan with organizational chart which will be completed under the direction of the new CEO as a separate milestone* *A staffing plan is a people resourcing strategy that outlines how many people, in what roles, and with what skills are needed to fulfill the organizational design and business goals*						
DEFER		Activity	Draft new job descriptions and engage with union as needed	*Refer to Labour Relations strategy*						
DEFER		Activity	Review and finalize job descriptions							
DEFER		Activity	Communicate with staff on org chart, roles, responsibilities, compensation, and transitions							
	Employee Contracts									
IN SCOPE	**IN SCOPE**	**Milestone**	**Collect inputs for employee contracts**			01-Mar	30-Apr	Pre-Day 1		
IN SCOPE		Activity	Determine if current society agreements will be considered terminated as of Day of the new organization; Determine if external employment counsel is required	*Coordinate with IT workstream on payroll systems and issuing Records of Employment and/or other documentation as needed*						
IN SCOPE		Activity	Assess additional obligations under statue and collective agreements regarding requirements for change of employer notices							
DEFER	**DEFER**	**Milestone**	**Review and execute employee contracts**			15-Aug	30-Nov	Pre-Day 1		Organizational Design
DEFER		Activity	Develop employment contracts for all staff members							
DEFER		Activity	Determine communications timeline and parameters for issuing notices and for employees to review contracts	*Coordinate with project leaders and change management workstreams to align on parameters regarding possibilities for individual negotiations.* *Coordinate with communications workstream on timeline for contract review and execution.*						
DEFER		Activity	Provide new contracts to employees for signature							
DEFER		Activity	Review and file executed contracts from employees							
	Organizational Design									
DEFER	**DEFER**	**Milestone**	**Develop an integrated organization chart that provides staff with clear roles in the organization**	*Assumption: This project is to be completed under the direction of the CEO, once appointed (assumed July 1, 2026 for planning purposes). This milestone will leverage the work completed under the Staffing Plan and Employee Contracts milestones (i.e., inventory of current and net new job descriptions).*		01-Jul	15-Sep	Pre-Day 1		Employee Contracts; CEO appointed
	Compensation & Benefits									
PARTIAL	**PARTIAL**	**Milestone**	**Develop and implement total compensation and benefits strategy**			01-Jul	30-Sep	Pre-Day 1		
IN SCOPE		Activity	Collect information on current total compensation and benefits strategy							
IN SCOPE		Activity	Identify transfer requirements, such as pension plans, vacation time, and accrued seniority from current societies to new organization							
DEFER		Activity	Define future HR budget							
DEFER		Activity	Review and analyze current total compensation and benefits profile							
DEFER		Activity	Develop total compensation and benefits package for new organization with an implementation timeline							
DEFER		Activity	Facilitate transfer of identified benefits (i.e., pensions, vacation, seniority) with external providers and IT systems as needed	*Coordinate with IT workstream on documentation needed in HRIS*						IT
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc. - coordinate with HR policies milestone*						
DEFER		Activity	Communicate total compensation and benefits package, transfer plans, timeline, and overall impact to current staff							
	Learning & Development									
DEFER	**DEFER**	**Milestone**	**Integrate staff learning and development processes and tools**	*For training related to the amalgamation, see change management approach for considerations*		01-Sep	30-Nov	Pre-Day 1		
DEFER		Activity	Collect learning and development policies, processes, and tools from each society							
DEFER		Activity	Analyze the learning and development approach from each society, identifying best practices and areas to integrate							
DEFER		Activity	Develop recommendations for a unified learning and development strategy for the new organization							CEO appointed

Combined Operations Workplan

Workstream	Sub stream	Type	Activity	Details / Notes	Responsible	Start Period	End Period	Phase	Status	Dependency
	Finance Policies									
PARTIAL	**PARTIAL**	**Milestone**	**Develop a single set of Finance Policies**			01-Jun	30-Sep	Pre-Day 1		
IN SCOPE		Activity	Review existing finance policies							
DEFER		Activity	Develop a single set of accounting policies for the new organization in the following areas:							
DEFER		Sub-activity	Investments							
DEFER		Sub-activity	Financial Controls							
DEFER		Sub-activity	Procurement							
DEFER		Sub-activity	Accounting policies (financial statements)							
DEFER		Activity	Develop a single set of expense policies for the new organization in the following areas:							
DEFER		Sub-activity	Travel and Business Expense Policy							
DEFER		Sub-activity	Committee member Compensation Policy							
DEFER		**Milestone**	**Develop Delegation of Authority (DoA) Policies**			01-Sep	31-Oct	Pre-Day 1		Finalized org chart with positions and titles
DEFER		Activity	Collect current practices from the societies							
DEFER		Activity	Develop draft DoA levels using anticipated job levels - Decisions and Payments							
DEFER		Activity	Review DoA clauses in rules, if applicable							
DEFER		Activity	Finalize DoA levels once org charts for new organization are developed							
	Chart of Accounts									
DEFER	**DEFER**	**Milestone**	**Single Chart of Accounts**			01-Jan	31-Mar	Pre-Day 1		
DEFER		Activity	Collaboration between SMEs from each organization and Finance system integration team to provide input and align on Chart of Accounts and Fund structures for new organization	*Finance representatives will provide all necessary inputs on CoA. Finance System integration team will ensure chosen Finance system has required capability and configurations to support new organization, including needs of the paralegals.*						Finance System Integration
	Finance Processes									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Finance function**	*This is business and technical project, and collaboration between Finance and IT workstreams will be necessary*		01-Jan	31-Mar	Pre-Day 1		This project is dependent on various technology projects related to Finance, CRM and Payroll/HRIS systems. Coordination will be required and SME knowledge and inputs will be required to support these technology projects (e.g. documenting current business processes, etc.)
IN SCOPE		Activity	Conduct current state mapping of business processes, including:	*e.g. understand manual workarounds currently being used, develop detailed understanding of A/R and A/P processes, map the # and type of bank accounts and credit cards,*						
IN SCOPE		Sub-activity	GL Procedures	*This will include drafting/revising a procedure manual to deal with income/expenses as they come in, to which accounts they get allocated.*						
IN SCOPE		Sub-activity	Expense/Payables Procedures	*Including expenses payable procedures from each society (how we pay bills, etc.), including documentation requirements.*						
IN SCOPE		Sub-activity	AR Procedures and how revenues are collected in the current systems	*Including inventory of revenue procedures (licensee dues, other)* *****connected to billing of licensees -- add more activities to address this "annual fee billing"***						
IN SCOPE		Activity	Map current state architecture for each society, including IT systems being used, high-level architecture of systems, integrations between systems							
IN SCOPE		Activity	Identify requirements for both societies							
IN SCOPE		Activity	Identify paralegal requirements	***If this is for billing, then yes***						
IN SCOPE		Activity	Conduct gap analysis, including an assessment of how current systems are meeting SNPBC, LSBC, and paralegal requirements and the identification of pain points	*Assumption is that the new regulator is not moving to a net new system*						
IN SCOPE		Activity	Develop approach to harmonizing Finance function and systems	*This will be a key component of an IT Roadmap*						
IN SCOPE	**IN SCOPE**	**Milestone**	**Develop future state vision and integration architecture for Finance function**	***Dependency - CRM. If we're not changing the CRMs, we will need a way to integrated this into the financial systems.***		01-May	30-Jun	Pre-Day 1		IT
IN SCOPE		Activity	Develop future state vision, including identifying system to be used	***If we don't change CRMs, there are implications here (see above)***						
IN SCOPE		Activity	Develop implementation plan for migrating existing processes to new system, including effort required, third party support needed, and cost implications							
DEFER		**Milestone**	**Implement future state vision**			01-Jul	31-Jul	Pre-Day 1		IT
DEFER		Activity	Migrate and onboard all parties to selected Finance system							
DEFER		Activity	Determine requirements to notify licensees, other stakeholders on Day 1 changes to legal names, credit terms, banking information, payment methods and credit limits, as required							
IN SCOPE	**IN SCOPE**	**Milestone**	**Inventory existing functions**			01-Apr	15-May	Pre-Day 1		
IN SCOPE		Activity	Develop an inventory of all functions performed by each Finance department in addition to the core finance functions covered in other projects (E.g. GL, AP, AR)							
IN SCOPE		Activity	Determine which Finance functions will be required for the new organization							
	Annual Compliance									
DEFER	**DEFER**	**Milestone**	**Prepare for Year-End**			01-Jul	31-Jul	Pre-Day 1		
DEFER		Activity	Establish a common understanding of year end requirements for deemed year-end immediately prior to Day 1 (e.g. stub period audit, cutoff procedures, financial statement preparation, tax returns, etc.)							
DEFER		Activity	Notify auditors and other impacted stakeholders							
DEFER	**DEFER**	**Milestone**	**Meet tax compliance & WorkSafe requirements**			01-Aug	31-Oct	Pre-Day 1		
DEFER		Activity	Identify CRA requirements for year end/amalgamations							New organization may require new registration #s / explore transferring an existing # if possible
DEFER		Activity	Complete CRA registration; Draft and send a letter aligning under two business numbers, ensuring legal entity name registration and addressing remittance timing and GST account conversion							
DEFER		Activity	Set up new WorkSafe account for new organization							
	Miscellaneous									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct Real Estate inventory**			01-Mar	30-Apr	Pre-Day 1		
IN SCOPE		Activity	Collect information on real estate assets and office leases							Will be dependent on space needs for the new organization
IN SCOPE		Activity	Develop options for using current space with consideration to lease terms							
DEFER		**Milestone**	**Conduct contracts inventory**			01-Mar	30-Apr	Pre-Day 1		Conduct this project early on to allow sufficient time to develop/implement any mitigating strategies
DEFER		Activity	Collect list of all contracts for both societies							
DEFER		Activity	Assess contractual obligations and any contingent liabilities							
DEFER		Activity	Determine which contracts are required and/or could be terminated							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
DEFER		Activity	Make note of renewal dates and requirements for amendments (e.g. # of users)							
DEFER		Activity	Ensure all required contracts are transferrable to the new organization							
DEFER		**Milestone**	**Conduct vendor inventory**			01-Jan	28-Feb	Pre-Day 1		
DEFER		Activity	Collect a list of vendors for each Society (e.g. legal counsel, auditors, investment managers, etc.)							Many vendors can be selected post Day 1 (auditor, investment manager, legal counsel)
DEFER		Activity	Assess the new organization's needs and identify where vendors could be harmonized (Day 1 vs post Day 1)							
DEFER		Activity	Determine where a process may be required to select a single vendor (that may require an RFP process)							
DEFER		Activity	Develop a plan for vendor selection for those required for Day 1							
DEFER		**Milestone**	**Plan for asset transfer**			01-Aug	30-Sep	Pre-Day 1		
DEFER		Activity	Identify any federally regulated assets or trademarks that will not be transferred vis the LPA							Under the LPA, all assets and liabilities will transfer to the new organization. It is not clear if this applies to non-BC regulated assets
DEFER		Activity	Identify process to ensure these federal assets are transferred to the new entity							
	Banking									
PARTIAL	**PARTIAL**	**Milestone**	**Align Treasury & Banking**			01-May	30-Jun	Pre-Day 1		
IN SCOPE		Activity	Inventory existing bank accounts and products (Financial Institution, Facilities, Products & Services)							
IN SCOPE		Activity	Develop overall operating model for banking including which financial institution(s) (number and types of accounts, products, including for subsidiaries)							
DEFER		Activity	Determine if new corporate accounts are needed (e.g. revenue account for paralegals)							
DEFER		Activity	Determine what changes if any to banking for Day 1							
DEFER		Activity	Change legal names, banking info, payment method, credit limits, and other critical information of organizations							
DEFER		Activity	Update contracts with payment processing merchants and other contractual obligations identified in legal workstream							
DEFER		Activity	Update signing authorities on bank accounts to take effect on Day 1							
DEFER		Activity	Activate accounts in the name of the new organization							This step needs to be completed on Day 1 (likely by the CEO)
	Budgeting and Forecasting									
DEFER	**DEFER**	**Milestone**	**Develop Budgets**			01-Jun	31-Jul	Pre-Day 1		
DEFER		Activity	Develop an aligned budget process for each society for 2027 (Post- Day 1)							
DEFER		Activity	Collect most current budget information from each society							
DEFER		Activity	Develop a consolidated budget							
DEFER		Activity	Identify potential incremental costs post Day 1 for each society							
DEFER		Activity	Determine projected surplus/deficit and funding sources							
DEFER		Activity	Inventory grants and related conditions; incorporate into budget projections as appropriate							
DEFER		Activity	Inventory loans and liabilities; assess ongoing ability to service							
DEFER	**DEFER**	**Milestone**	**Develop Forecasts**			01-Aug	15-Sep	Pre-Day 1		
DEFER		Activity	Estimate the number of licensees by profession on Day 1 and project out growth for 3-5 years	*This information will inform various activities including budgeting, fee schedule harmonization and requirement for additional resources (regulatory and corporate supports)*						
DEFER		Activity	Estimate number of paralegals and fees on Day 1 and over the same 3-5 year period							
DEFER		Activity	Prepare a forecast for the number of licensees to be governed by Legal Professions BC							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Operations		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Office Space									
PARTIAL	**PARTIAL**	**Milestone**	**Identify space requirements**	*Start this project early to allow time for sufficient space planning*		01-Mar	30-May	Pre-Day 1		HR Hybrid Work Policy
IN SCOPE		Activity	Determine space requirements for:							
IN SCOPE		Sub-activity	SNPBC staff							
IN SCOPE		Sub-activity	Staff required to support paralegals							
IN SCOPE		Sub-activity	Staff required to support increase in staffing (various support functions)	*Require coordination and analysis with various work groups to analyze/identify additional staffing supports*						
IN SCOPE		Sub-activity	Space requirements for Tribunal							
IN SCOPE		Activity	Review hybrid work policy to inform space requirements							
DEFER		Activity	Develop storage/ retention policy; consider digitization of paper files to optimize storage							
IN SCOPE		Activity	Determine how LSBC office could be configured to support additional staff							
DEFER		Activity	Develop departmental seating plans that take into account storage, meeting room access, equipment (photocopiers, etc.)							
DEFER	**DEFER**	**Milestone**	**Evaluate facility operations for the new organization**			01-Jul	30-Sep	Pre-Day 1		
DEFER		Activity	Conduct an audit of all physical branding assets (signs, billboards, advertisements, etc.)							
DEFER		Activity	Develop a plan for updating physical branding assets with the new Names and Marks							
DEFER		Activity	Inventory all stationery, business cards, purchase orders, and similar assets for rebranding							
DEFER		Activity	Identify and list all legal documents and records that require updating of Names and Marks							
DEFER		Activity	Prepare legal filings for updating the entity's name and marks with Government Entities							
DEFER		Activity	Issue notices to Third Parties regarding the update of Names and Marks and any evidence of operation							
DEFER		Activity	Update contractual obligations and records to reflect the name of the amalgamated entity							
	Moving Spaces									
DEFER	**DEFER**	**Milestone**	**Develop detailed move checklist**			01-Oct	31-Dec	Pre-Day 1		
DEFER		Activity	Develop a detailed move plan and checklist for Day 1 (or move date if different). Components to include:							
DEFER		Sub-activity	Common emails							
DEFER		Sub-activity	Phone numbers (if different)							
DEFER		Sub-activity	Parking							
DEFER		Sub-activity	Move process - moving company logistics							
DEFER		Sub-activity	Disposal of unnecessary files, equipment							
DEFER		Sub-activity	Building security & access							
DEFER		Sub-activity	Staffing training requirements on building, corporate support services							
DEFER		Sub-activity	Order of new letterhead/stationary and business cards							
DEFER		Sub-activity	Vendor communications to update on location and name change							
DEFER		Sub-activity	Set up mail forwarding with Canada Post							
DEFER		Sub-activity	Communication notifying Board, Committee members of changes							
DEFER		Sub-activity	Communications to licensees on moves							
DEFER		Sub-activity	Updates to website - "we have moved"							
DEFER		Sub-activity	Equipment set up for laptops, printers, etc. for Day 1 / move date							

Combined Operations Workplan										
Workstream	Sub stream	Type	Activity	Details / Notes	Responsible	Start Period	End Period	Phase	Status	Dependency
Communications		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	Brand									
PARTIAL	**PARTIAL**	**Milestone**	**Develop new brand identity for regulator**	*Transitional Board will have input*		01-Jun	15-Sep	Pre-Day 1		
IN SCOPE		Activity	Consider impact analysis for a temporary vs. long-term brand identity							
IN SCOPE		Activity	Gather information for background to share with external consultant and define scope of work and deliverables (i.e., logo, font(s), stationary packages, etc.), while including necessary consultations with other parties							
DEFER		Activity	Procure external branding consultant to develop new brand identity	*Assumes this is outsourced. Could be done in house should one of the Society's have the skills & experience*						
DEFER		Activity	Ensure consultation with necessary parties after procuring branding consultant	*Consider the need for an Indigenous consultant and/or an external legal review; consider how to "reveal" new brand with staff*						
PARTIAL	**PARTIAL**	**Milestone**	**Develop new brand identity for Insurance entity**			01-Jun	15-Sep	Pre-Day 1		
IN SCOPE		Activity	Gather information for background to share with external consultant and define scope of work and deliverables (i.e., logo, font(s), stationary packages, etc.), while including necessary consultations with other parties							
DEFER		Activity	Procure external branding consultant to develop new brand identity and insurance operating name that reflects all licensee types							
DEFER		Activity	Ensure consultation with necessary parties after procuring branding consultant	*Consider the need for an Indigenous consultant and/or an external legal review; consider how to "reveal" new brand with staff*						
PARTIAL	**PARTIAL**	**Milestone**	**Develop new brand identity for Tribunal**			01-Jun	15-Sep	Pre-Day 1		
IN SCOPE		Activity	Gather information for background to share with external consultant and define scope of work and deliverables (i.e., logo, font(s), stationary packages, etc.), while including necessary consultations with other parties							
DEFER		Activity	Procure external branding consultant to develop new Tribunal brand identity and operating name that reflects all licensee types							
DEFER		Activity	Ensure consultation with necessary parties after procuring branding consultant	*Consider the need for an Indigenous consultant and/or an external legal review; consider how to "reveal" new brand with staff*						
PARTIAL	**PARTIAL**	**Milestone**	**Integrate new branding across new organization and corporate materials**			15-Sep	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Determine top priorities for execution of rebranding	*Website; letterhead; MS templates for Word, Excel, PPT; templates for policies, reports, etc.*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
DEFER		Activity	Share templates with other workstreams as needed for their amalgamation work							
DEFER		Activity	Coordinate integrated launch of all branding materials							
	Transition Website									
PARTIAL	**PARTIAL**	**Milestone**	**Determine need for an amalgamation / transition project website**			01-Jan	28-Feb	Pre-Day 1		
IN SCOPE		Activity	Identify potential needs for a transition website (i.e. password protected section for staff to review documents, answering questions from the public, etc.)							
IN SCOPE		Activity	Explore if existing transition website utilized by the Transition Board (https://lpatransition.ca/), or other communication tactics could meet the identified needs							
DEFER		Activity	Develop a plan to implement an transition website *(if needed)*							
	LPBC Websites									
PARTIAL	**PARTIAL**	**Milestone**	**Develop new website with critical content to reflect new unified organization**	*The development and launch of a new website will be a collaboration across workstreams. The activities in the Communications workplan are related to the business components while the IT workplan reflects the technical components.*		01-Jul	31-Dec	Pre-Day 1		IT
IN SCOPE		Activity	Conduct a current state assessment of websites and portals							
IN SCOPE		Activity	Examine websites to identify content to be merged, rewritten, or created from scratch							
IN SCOPE		Activity	Determine roles and responsibilities of external web developer, workstreams, Communications staff							
DEFER		Activity	Develop an interim Style Guide for the amalgamation and initial documentation and website content for the new organization							
DEFER		Activity	Coordinate content development needed for corporate level pages (i.e. About Us language)							
DEFER		Activity	Developed detailed plan for migrating to a single website and portal							
DEFER		Activity	Coordinate content development across functional pages, including templates and timelines	*Coordinate with other workstreams and SMEs to share the writing load*						
DEFER		Activity	Launch new website for new unified organization							
PARTIAL	**PARTIAL**	**Milestone**	**Launch new Insurance entity website with key content**	*The development and launch of a new website will be a collaboration across workstreams. The activities in the Communications workplan are related to the business components while the IT workplan reflects the technical components.*		01-Jul	31-Dec	Pre-Day 1		IT
IN SCOPE		Activity	Conduct a current state assessment of websites and portals							
IN SCOPE		Activity	Examine websites to identify content to be merged, rewritten, or created from scratch							
IN SCOPE		Activity	Determine roles and responsibilities of external web developer, Insurance function, Communications staff							
DEFER		Activity	Develop content relevant to all licensees							
DEFER		Activity	Launch new Insurance website							
PARTIAL	**PARTIAL**	**Milestone**	**Launch new Tribunal entity website with key content**	*The development and launch of a new website will be a collaboration across workstreams. The activities in the Communications workplan are related to the business components while the IT workplan reflects the technical components.*		01-Jul	31-Dec	Pre-Day 1		
IN SCOPE		Activity	Conduct a current state assessment of websites and portals							IT
IN SCOPE		Activity	Examine websites to identify content to be merged, rewritten, or created from scratch							
IN SCOPE		Activity	Determine roles and responsibilities of external web developer, Insurance function, Communications staff							
DEFER		Activity	Develop content relevant to all licensees							
DEFER		Activity	Launch new Tribunal website							

Combined Operations Workplan										
Workstream	Sub stream	Type	Activity	Details / Notes	Responsible	Start Period	End Period	Phase	Status	Dependency
	Social Media									
PARTIAL	**PARTIAL**	**Milestone**	**Create new social media properties for new organization**			01-Oct	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Review inventory of social media properties							
IN SCOPE		Activity	Determine which properties to keep vs. retire							
IN SCOPE		Activity	Develop plan to transition to new social media properties with new organization name and branding							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
DEFER		Activity	Launch the new social media accounts							
	Intranet									
PARTIAL	**PARTIAL**	**Milestone**	**Develop and update intranet content**	*The development and launch of a new Intranet will be a collaboration across workstreams. The activities in the Communications workplan are related to the business components while the IT workplan reflects the technical components.*		01-Sep	30-Nov	Pre-Day 1		IT
IN SCOPE		Activity	Review intranet content by functional area							
IN SCOPE		Activity	Develop prioritized list of content to be updated							
DEFER		Activity	Assess what content is changing							
DEFER		Activity	Work with teams across the organization to develop updated content							
DEFER		Activity	Launch new Intranet							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Privacy, Records & Info Mgmt		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	FOI and FIPPA									
PARTIAL	**PARTIAL**	**Milestone**	**Develop an updated, unified process for handling FOI requests that arrive after Day 1**			01-Oct	31-Dec	Pre-Day 1		
IN SCOPE		Activity	Develop new, unified process for handling FOI requests that arrive after Day 1							
IN SCOPE		Activity	Ensure ability to manage in-progress FOI requests (those that arrived before Day 1) using current processes							
DEFER		Activity	Collate all existing FOI requests across each Society, ensuring ownership of each file							
DEFER		Activity	Ensure ability to comply with statutory time frames for FIPPA requests	*This includes aligning on statutory time frames, harmonizing the process for responding to requests related to all licensee types, and ensuring ability for staff to access required documents across Document Management systems.* *Note: SNPBC don't get many FOI requests – the last one was in 2019; whereas LSBC has ~25 open at any given time.*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.* *Review current privacy, records, and information management policies at each Society*						
	Privacy									
PARTIAL	**PARTIAL**	**Milestone**	**Complete the most urgent Privacy Impact Assessments**			01-Jan	31-Mar	Pre-Day 1		
IN SCOPE		Activity	Review current approach to Privacy Impact Assessments (PIAs) at LSBC							
IN SCOPE		Activity	Confirm approach to PIAs within new organization	*Can each society use each other's tools or do we need to do new PIAs before adding a Society to a tool? PIAs are a big draw on team's time, perhaps prioritize larger tools for PIAs first.*						
IN SCOPE		Activity	Identify any systems, processes, tools, or activities that require PIAs based on the amalgamation work to be done							
IN SCOPE		Activity	Plan for completing amalgamation PIAs by prioritizing them based on impact and urgency							
DEFER		Activity	Complete amalgamation PIAs							
DEFER		Activity	Develop plan for continuity of all other PIAs (not related to the amalgamation)							
PARTIAL	**PARTIAL**	**Milestone**	**Develop a harmonized approach to publishing disciplinary action decisions by licensees**			01-Jun	31-Aug	Pre-Day 1		
IN SCOPE		Activity	Confirm which information about disciplinary actions are currently published for each licensee type							
IN SCOPE - PARTIAL - DEFER TO WHEN RULES ARE READY		Activity	Confirm if LPA or Rules will dictate which actions must be published by the new organization							Rules
DEFER		Activity	Determine a harmonized approach to publishing disciplinary action decisions by licensees							
PARTIAL	**PARTIAL**	**Milestone**	**Develop a unified set of privacy and access processes**			01-Jun	31-Aug	Pre-Day 1		
IN SCOPE - PARTIAL		Activity	Anticipate privacy breaches / complaints due to amalgamation and approach to risk mitigation							
IN SCOPE		Activity	Develop a single set of processes for managing privacy breaches							
DEFER		Activity	Train all Regulator staff on a shared understanding of privacy security obligations							
IN SCOPE		Activity	Review existing access and permissions							
DEFER		Activity	Determine security and access to files and records at the new entity							Linked to HR organizational chart workstream
DEFER		Activity	Confirm policies around access to historic documents at each Society							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.* *Develop a single privacy policy for new organization*						
	Records Management									
PARTIAL	**PARTIAL**	**Milestone**	**Maintain status quo on records management for custodianships at each Society (continue to be managed independently)**	*Note - Notaries Society is completely digital (no paper records, except for Custodianships)*		01-Sep	31-Oct	Pre-Day 1		
IN SCOPE		Activity	Consider if new regulator will carry over LSBC document retention policies and block-numeric classification system of document types for past LSBC documents, if this system will apply to past Notaries documents, and if it will apply to documents created within new organization							
DEFER		Activity	Confirm where physical / paper documents will be stored for custodianships	*LSBC: Custodianships use Iron Mountain, and manage their records independently. SNPBC: Paper records are stored in basement of building.*						
IN SCOPE		Activity	Review current books and subscriptions, including format; Identify overlap with Notaries and consolidate subscription contracts							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.* *Confirm any specific distinctions around document retention schedules for notaries and paralegals, and how they align to lawyers' current retention schedules*						

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
Technology		Milestone, Activity, Sub-Activity	Short description of the activity (please include additional information in the comments section - column O)		Group or Individual	Day-Month	Day-Month	Pre-Day 1. Day 1, Post Day 1	Not Started, In Progress, Delayed, Complete	E.g., Finance, IT, Registration, Rules
	HR									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the HR function**	**See HR workplan for details.* *This is business and technical project, and collaboration between HR and IT workplans will be necessary*		01-Apr	30-May	Pre-Day 1		
PARTIAL	**PARTIAL**	**Milestone**	**Develop future state vision and integration plan for HR function**	**See HR workplan for details.*		01-Jun	30-Jun	Pre-Day 1		
DEFER	**DEFER**	**Milestone**	**Implement future state vision**	**See HR workplan for details.*		01-Oct	30-Nov	Pre-Day 1		
	Payroll									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize Payroll function**	**See HR workplan for details.* *This is business and technical project, and collaboration between HR and IT workplans will be necessary*		01-Apr	30-May	Pre-Day 1		
PARTIAL	**PARTIAL**	**Milestone**	**Develop future state vision and integration plan for Payroll function**	**See HR workplan for details.*		01-Jun	30-Jun	Pre-Day 1		
DEFER	**DEFER**	**Milestone**	**Implement future state vision**	**See HR workplan for details.*		01-Oct	30-Nov	Pre-Day 1		
	Finance									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping and identify opportunities to harmonize the Finance function**	**See Finance workplan for details.* *This is business and technical project, and collaboration between Finance and IT workplans will be necessary.*		01-Jan	31-Mar	Pre-Day 1		
PARTIAL	**PARTIAL**	**Milestone**	**Develop future state vision and integration plan for Finance function**	**See Finance workplan for details.*		01-May	30-Jun	Pre-Day 1		
DEFER	**DEFER**	**Milestone**	**Implement future state vision**	**See Finance workplan for details.*		01-Jul	31-Jul	Pre-Day 1		
	Public Registry									
PARTIAL	**PARTIAL**	**Milestone**	**Develop a clear future state vision for Public Registry and a detailed plan for migrating to new systems**	*Coordinate with Registration workstream.*		01-Jun	30-Sep	Pre-Day 1		
IN SCOPE		Activity	Identify current IT architecture for supporting public registries							
IN SCOPE		Activity	Map current business processes used by each Society to maintain public registries, including technology systems and manual workarounds							
IN SCOPE		Activity	Identify any new requirements initiated by LPA or Rules							
IN SCOPE		Activity	Identify paralegal requirements							
IN SCOPE		Activity	Develop future state vision for public registry							
DEFER		Activity	Develop plan for migrating existing registry processes and data to new systems, including effort required and cost implications							
DEFER		Activity	Migrate to new system							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Websites									
PARTIAL	**PARTIAL**	**Milestone**	**Develop 3 new websites (LPBC, Insurance entity, and Tribunal), with dynamic forms, active portal, and integrated with backend systems (e.g. CRMs)**	*The development and launch of a new website will be a collaboration across workstreams. The activities in the IT workplan are related to the technical components while the Communications workplan reflects the business components of the project.*		01-Jun	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Validate and secure the new URL and domain name and link to email addresses							
IN SCOPE		Activity	Develop strategy for competing domain names	*"lpbc.ca" is used by the Lorne Park Baptist Church*						
IN SCOPE		Activity	Purchase domain names and secure URLs for both the insurance entity and the Tribunal; link to email addresses; plan to redirect old websites to new website on Day 1							
IN SCOPE		Activity	Develop website map							
DEFER		Activity	Work with functional areas to gather updated information for including on website	*This activity requires the most significant effort by the business functions*						
DEFER		Activity	Build dynamic forms to be integrated into website	*E.g. intake form for Complaints (form content and structure depends on knowing the future state for a process)*						Clarity on process changes
DEFER		Activity	Integrate forms with CRMs, so that content is captured and stored in CRMs							
DEFER		Activity	Expose the public registry on the website with search capability							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Internal Communications Systems									
PARTIAL	**PARTIAL**	**Milestone**	**Develop a clear future state vision for internal communication tools**			01-Sep	31-Dec	Pre-Day 1		
IN SCOPE		Activity	Conduct a current state assessment of internal communication tools	*Teams, Zoom, etc.*						
IN SCOPE		Activity	Develop future state vision for internal communication tools							
DEFER		Activity	Establish new emails for new entity							
DEFER		Activity	Confirm phone system and phone numbers for new entity							
DEFER		Activity	Implement future state vision, including moving to a single set of tools							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Core Regulatory Systems (CRM, Document Management, LMS)									
IN SCOPE	**IN SCOPE**	**Milestone**	**Conduct current state mapping of processes supported by core regulatory systems**			01-Jan	31-May	Pre-Day 1		
IN SCOPE		Activity	*Included in each functional area's workplan.	*This current state mapping serves several purposes:* *- understand commonalities (and how much harmonization possible)* *- more quickly understand the impact of any decisions made by Transitional Board (because we can talk details with this baseline), and* *- understand how paralegals will map onto these existing processes (when we collect paralegal requirements we'll know which systems can support paralegal needs)*						
	IT Assets									
PARTIAL	**PARTIAL**	**Milestone**	**Conduct inventory of hardware and licenses**			01-Sep	31-Oct	Pre-Day 1		
IN SCOPE		Activity	Inventory IT Assets across both societies (Make/Model/Age/Book Value/Planned Purchases)							

Combined Operations Workplan										
Workstream	**Sub stream**	**Type**	**Activity**	**Details / Notes**	**Responsible**	**Start Period**	**End Period**	**Phase**	**Status**	**Dependency**
IN SCOPE		Activity	Evaluate current and future IT requirements - servers, telephony, emails, storage, etc.							
DEFER			FUTURE STATE VISION							
IN SCOPE		Activity	Assess and review software licenses status & requirements for future	*Could the existing contracts be modified to increase user #? Opportunities to renegotiate, or terminate?*						
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	User Access									
PARTIAL	**PARTIAL**	**Milestone**	**Manage user access**			01-Oct	30-Nov	Pre-Day 1		
IN SCOPE		Activity	Conduct current state mapping to for user access across both Societies							
IN SCOPE		Activity	Develop access and security matrix for all roles in the new organization	*Including type of access to all IT systems*						Org. structure
DEFER		Activity	Map security access to each individual employee in the new organization							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						
	Intranet									
DEFER	**DEFER**	**Milestone**	**Update Intranet, in collaboration with Communications**	*See communications workstream.*		01-Aug	30-Dec	Pre-Day 1		
DEFER		Activity	Coordinate with Communications workstream to update intranet to reflect new entity							
DEFER		Activity	Update policies and other governing documents	*SOPs, procedure manuals, etc.*						