

ADVICE TO MINISTER

CONFIDENTIAL ISSUE NOTE

Ministry of Citizens' Services, Multiculturalism
and the Public Affairs Bureau

Date: August 5, 2009

Minister Responsible: Hon. Ben Stewart

Created by the Public Affairs Bureau

Centralization of Freedom of Information and Records Management.

KEY FACTS REGARDING THE ISSUE:

- To improve government's performance in responding to Freedom of Information (FOI) requests, information access, privacy and records management staff have been centralized in a single work unit within the Ministry of Citizens' Services, reporting to Shared Services BC.
- Information Access Operations (IAO) was created in January 2009 and includes 145 staff located in 12 different ministries/ministry pods. IAO also includes a small senior management team and staff from the Corporate Records Management Branch formerly in the Office of the Chief Information Officer.
- There are many benefits to centralization, including consistency in processes, elimination of duplication and reassignment of resources to meet workload demands.
- IAO is working on both business transformation and organization redesign to create a client service-oriented and performance-oriented organization.
- The centralized organization will allow for:
 - Implementation of standardized, consistent processes and staff practices;
 - Ability to apply consistent interpretation and application of the legislation and associated policies and procedures;
 - Full flexibility to quickly respond, cross-train staff to redeploy resources based on workload and allow for staff rotations;
 - Simple and streamlined workflow between functional areas;
 - A proactive release strategy that reduces the need for FOI requests;
 - A consistent records program that supports appropriate management of government information; and
 - Achievement of performance targets including timely release of government information in response to FOI requests.

ADVICE AND RECOMMENDED RESPONSE:

- British Columbia is a leader in access to information and protection of privacy, and our legislation is amongst the strongest in Canada.
- Government is committed to freedom of information and responding to FOI requests in a timely manner, and supports openness and accountability.
- This commitment prompted us to act in January 2009 to centralize our information access operations.
- The new structure will further improve response times, make better use of resources and provide streamlined “one window” service for people making access requests.

Communications Contact:

Program Area Contact:

Created:

Filename and path:

Program Area	Comm. Dir	ADM	DM

ADVICE TO MINISTER

CONFIDENTIAL ISSUE NOTE

Ministry of Citizens' Services, Multiculturalism
and the Public Affairs Bureau

Date: August 4, 2009

Minister Responsible: Hon. Ben Stewart

Created by Shared Services BC

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Program Area	Comm. Dir	ADM	DM

ADVICE TO MINISTER

CONFIDENTIAL ISSUE NOTE

Ministry of Citizens' Services, Multiculturalism
and the Public Affairs Bureau

Date: September 10, 2009

Minister Responsible: Hon. Ben Stewart

Created by the Public Affairs Bureau

Centralization of Freedom of Information and Records Management.

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Program Area Contact:

Created:

Filename and path:

Program Area	Comm. Dir	ADM	DM

GENERAL REQUESTS

General Requests	2008/09 Open Requests Carried Forward	Annual (Year to Date) Totals				Current Opened Files
		Requests Received since April 1, 2009	Closed	Closed On Time	Closed Overdue	
Aboriginal Relations and Reconciliation	2	11	6	5	1	7
Advanced Education and Labour Market Development (ALM)	8	25	28	25	3	5
Agriculture and Lands	4	19	8	8	0	15
Attorney General	8	41	32	27	5	17
BC Public Service Agency	3	18	20	17	3	1
Children and Family Development	11	38	40	40	0	9
Citizens' Services	22	58	54	45	9	26
Community and Rural Development	11	26	26	26	0	11
Education	7	25	26	20	6	6
Energy, Mines and Petroleum Resources	7	22	18	18	0	11
Environment	22	91	73	70	3	40
Finance	29	100	78	58	20	51
Forests and Range	26	113	98	91	7	41
Health Services	9	57	47	47	0	19
Healthy Living and Sport	5	45	35	31	4	15
Housing and Social Development	23	98	90	54	36	31
Labour	1	12	6	5	1	7
Office of the Premier	11	45	31	27	4	25
Public Safety and Solicitor General	22	86	83	68	15	25
Small Business, Technology and Economic Development	3	10	8	8	0	5
Tourism, Culture and the Arts	6	20	19	19	0	7
Transportation and Infrastructure	47	94	117	113	4	24
Total General	287	1054	943	822	121	398

PERSONAL REQUESTS

Personal Requests	2008/09 Open Requests Carried Forward	Annual (Year to Date) Totals				Current Opened Files
		Requests Received since April 1, 2009	Closed	Closed On Time	Closed Overdue	
Aboriginal Relations and Reconciliation	1	2	3	2	1	0
Advanced Education and Labour Market Development (ALM)	0	13	11	11	0	2
Attorney General	10	39	44	41	3	5
BC Public Service Agency	15	68	76	69	7	7
Children and Family Development	144	856	868	864	4	132
Citizens' Services	3	24	22	22	0	5
Education	1	4	5	5	0	0
Environment	0	1				1
Finance	4	12	15	12	3	1
Forests and Range	0	4	4	4	0	0
Health Services	3	29	31	31	0	1
Housing and Social Development	133	836	884	686	198	85
Labour	1	7	6	6	0	2
Office of the Premier	1	0	1	1	0	0
Public Safety and Solicitor General	267	757	916	633	283	108
Transportation	0	2	2	2	0	0
Total Personal	583	2,654	2,888	2,389	499	349
COMBINED TOTAL GENERAL AND PERSONAL	870	3,708	3,831	3,211	620	747



Shared
ServicesBC

Integrated Service
Solutions Division

Information Access Operations (IAO) Branch

Deputy Ministers Committee on Shared Services
June 30, 2009



Purpose of presentation

1. **Background on centralization and progress to date**
2. **Proposed Organization Structure**
3. **Funding model decision**
4. **Update on FOI sign off proposal**

- **Timeliness of FOI requests**
 - Only 71% of requests closed on time in 2008
 - OIPC timeliness report – delays a “serious and ongoing problem”
- **Smarter and Open Government**
 - Duplication of services in 11 separate offices
 - Inconsistency in processes and application of the legislation
 - Corporate approach to proactive release; FOI to be the last resort



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Performance to date

Percentage of FOI requests closed on time

	<u>2008</u>	<u>2009*</u>
Generals	62%	80%
Personals	75%	73%**
Total	71%	74%

* April 1, 2009 to date

** Primary issue is increased volume and backlog in PSSG/Corrections files

The new IAO will deliver the following business outcomes:

1. Timely, accurate and appropriate release of government information in response to FOI requests;
2. A coordinated and proactive release strategy that reduces the need for FOI requests;
3. A fully implemented, consistent records management program that supports government business throughout the lifecycle of a record;
4. A work environment that fully supports employee engagement and the BC Public Service Values; and
5. An effective and aligned approach to information security and privacy protection management.



FOI Operations

- FOI access request processing
- FOI client awareness
- Advisory services; e.g., Executive briefings
- Performance reporting
- Business process reviews
- Encourage opportunities for pro-active release
- Operational policy

Records Management

- Administration of the Document Disposal Act
- Appraisal - Determine on behalf of government which records have ongoing archival value
- Operational Records Classification System (ORCS) development
- Administrative Records Classification System maintenance
- Electronic records keeping systems implementation and administration
- Off-site records storage and destruction
- Manage records related projects

Privacy Operations

- Advise on Privacy Impact Assessments and Information Sharing Agreements
- Manage Privacy breach incidents
- Report to OIPC regarding inappropriate release of personal information
- Privacy client awareness
- Advisory services; e.g., Executive briefings
- Ensure alignment between privacy policy, privacy operations and information security



- 6000 FOI requests processed in 2008 – 70% requests for personal information
- 37% increase in FOI requests in 2009 compared to 2008; 3520 requests received so far this year
- Between 50 and 100 general requests received each week; between 100 and 120 personal requests/week
- Average 30 general requests closed/week; average 150 personal requests closed/week
- 374 general requests currently open
- 449 personal requests currently open



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Performance Management Information – Records Management

- 900,000 boxes currently in storage
- 4% increase per year in records storage volume
- 50,000 new boxes received per year
- 40,000 boxes destroyed per year
- 3,500 service requests per year; four private companies used to handle records storage and retrieval services
- Lowest storage costs in Canada; \$6.48 per box (\$13 per box for federal government in Vancouver); cost includes storage, retrieval, refilling and destruction
- Records retention schedules – 100 program-specific ORCS developed to date
- Electronic records system (TRIM) – 5,000 users across seven ministries



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FTEs transferred from ministries

Attorney General	17
Children & Family Development	31
Community & Rural Development	8
Education	13 (1 vacancy)
Environment	11 (1 vacancy)
Finance	14 (1 vacancy)
Forests and Range	9
Health	8 (1 vacancy)
Housing & Social Development	18.5 (1 vacancy)
Small Business and Revenue	4.5 (redeployed to other ministries)
Small Business, Technology & Economic Dev.	4
Transportation	7
Total transferred from ministries	145
Corporate Records Management Branch	22
Management and Business Support	5
IAO Total FTE's	172



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IAO Budget

Transfers from ministries	\$11,563,655*
Corporate Records Expenditures	\$6,220,000
Corporate Records Recoveries	(\$5,033,000)
Corporate Records Net Budget	\$1,187,000
Management and Business Support	\$681,213**
Total	\$13,431,868

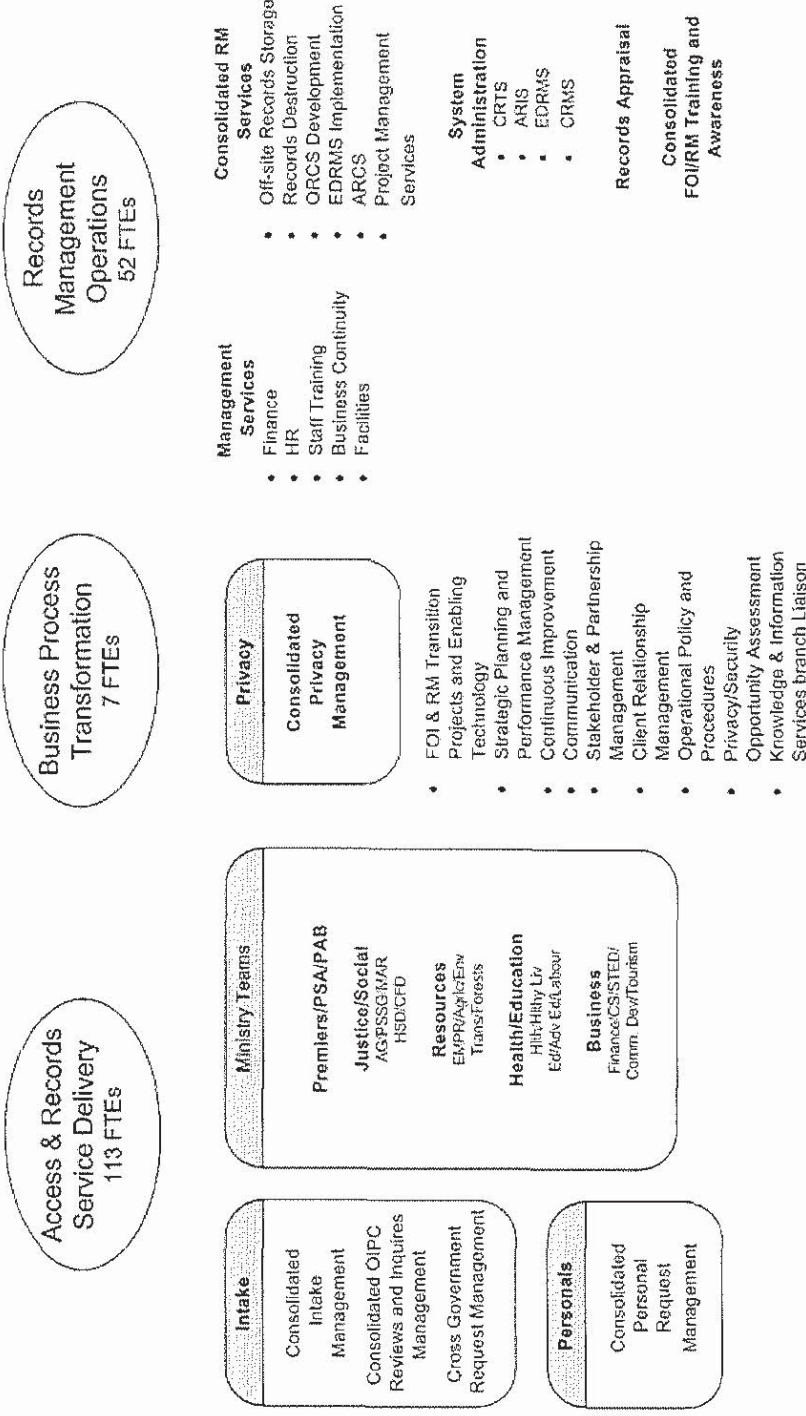
* Negotiations with ministries near completion

** If approved funding model \$1000 vote, IAO will risk manage this budget pressure. If not, additional amount will need to be transferred from ministries. In addition, it is expected that IAO will find efficiencies to fund additional costs for business process improvements and enabling technology.

Functional Organization Structure



Information Access Operations





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Funding Model

- Current status \$1,000 vote - ministries have transferred budget and frozen in STOB 5904
- Decision required on most appropriate funding model for this legislated program:

Option 1: continue with \$1,000 vote

Option 2: mixed model – voted appropriation, combined with a charge back model

Option 1: Continue with \$1,000 vote structure – ministries are required to fund operation based on workload. Charge back to ministries a total of \$11,563,655 plus an additional \$1,187,000 for corporate records services (\$12,750,655), and continue \$5,033,000 in records storage and records service projects recoveries.

Pros:

- Consistent with current shared service model.
- Ministries pay for level of service consumed and costs are more accurately shown against programs/ministries using the service.
- Encourages ministries to support efficiencies as it impacts their budget.

Cons

- Difficult to forecast full cost of this type of service and develop a rate structure as FOI requests can vary significantly from year to year.
- Difficult to forecast full cost of records services and develop a rate structure.
- There is no mandated requirement for records management other than regarding destruction, therefore ministries could choose not to pay having a negative impact on government records.
- Requires higher administrative costs to manage the tracking and recovery of costs from ministries.
- With STOB 59 budget freeze ministries have no flexibility to meet changing funding requirements based on consumption of services.
- Does not incent efficiencies from a central prospective as funding is fixed in ministry budgets rather than in one central location.

Option 2: Mixed Model – voted appropriation combined with a charge back model for offsite records storage and records service projects (ORCS development). Budget amount permanently transferred - \$11,563,655 plus \$1,187,000 (total of \$12,750,655) in voted appropriation, and \$5,033,000 in cost recoveries continued.

Pros:

- Does incent/allow for greater efficiencies as funding for fixed costs are budgeted centrally and variable costs are recovered directly from ministries.
- Gives ministries certainty over core costs which are funded centrally and allows them to focus on opportunities to achieve savings in variable costs.
- Allows IAO to achieve efficiencies by focusing on economies of scale in the cores services areas to deal with FOI request volume increases without requesting additional funding from ministries.
- Consistent with current model used for Corporate Records Management.

Cons

- Not consistent with current shared service model.

Recommended: Option 2 – program is a mandated function and requires core funding

- The last presentation to DMC was on a proposed new sign off process
- Concerns were raised regarding delegation of sign off, and a request was made for more information on the reasons for delays in meeting legislated timelines
- A delay analysis was conducted and a report has been prepared
-
-

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Questions?

Operating and FTE Budget Submission Adjustments Template

Appendix B

BRANCH: Information Access Operations
ESTIMATES SERVICE LINE #:

BRANCH: Corporate Records Management
ESTIMATES SERVICE LINE #:

	Description	Fiscal 2009/2010	1	IAO Management	2009/10 Estimates
	FTEs	125		2	127
50	BASE SALARIES & OVERTIME				
51	SUPPLEMENTARY SALARY COSTS	6,721,592		166,565	6,888,157
52	EMPLOYEE BENEFITS	0		0	0
57	PUBLIC SERVICE TRAVEL EXPENSES	1,623,265		40,225	1,663,490
5901	LEGAL SERVICES	82,447		2,000	84,447
5906	BC PUBLIC SERVICE AGENCY	0		80,000	80,000
5909	ARES RECURRING OCCUPANCY CHARGES	137,875		2,206	140,081
5925	WTS FIXED COSTS	745,753		13,000	758,753
5926	WTS NEGOTIATED CONTRACT	274,672		4,384	279,056
59	PAYROLL	25,337		0	25,337
60	PROF SERVS - OPERATIONAL & REGULATORY	15,315		257	15,573
61	PROF SERVS - ADVISORY	35,000		0	35,000
63	INFORMATION SYSTEMS-OPERATING	0		0	0
65	OFFICE & BUSINESS EXPENSES	23,759		1,920	25,679
67	INFORMATIONAL ADVERTISING & PUBLICATIONS	436,947		107,600	544,547
73	AMORTIZATION	0		0	0
88	RECOVERIES - WITHIN GOV REPORTING ENTITY	39,000		0	39,000
		(343,733)		0	(343,733)
TOTAL		9,817,229	0	418,157	10,235,386

travel 10,235,386
office and buss -55,000
CRMB -14,823
-165,562

CRMB Reduction

165,562

TARGET 10,000,000 (plus \$890,855 CRMB although only \$579,000 exists in OCIO's budget for governance - remainder was cut by OCIO before transfer to IAO)
10,000,000 includes CIMB less governance (\$500,000) plus increased recoveries to bring base budget to \$10,000,000

2010/2011 Budget

Fiscal 2009/2010	1	2	3	2009/10 Estimates
19				19
1,084,638				1,084,638
18,000				18,000
261,940				261,940
12,955				12,955
5,000				5,000
0				0
110,545				110,545
180,182				180,182
0				0
0				0
4,106,000				4,106,000
0				0
2,000				2,000
245,541				245,541
27,636				27,636
0				0
(5,033,000)				(5,033,000)
1,021,438	0	0	0	1,021,438

Total IAO Budget
146
7,972,795
18,000
1,925,430
97,401
85,000
140,081
869,298
459,238
25,337
15,573
4,141,000
0
27,579
790,088
27,836
39,000
(6,376,733)
11,256,823

Operating and FTE Budget Submission Adjustments Template

Appendix B

BRANCH: Corporate Records Management
ESTIMATES SERVICE LINE #:

	Fiscal 2009/2010	1	2	2009/10 Estimates
	149			149
	8,301,439			8,301,439
	0			0
	2,004,798			2,004,798
	97,390			97,390
	80,000			80,000
	164,347			164,347
SES	873,627			873,627
	325,428			325,428
	29,721			29,721
	18,149			18,149
ATORY	35,000			35,000
	0			0
	25,679			25,679
	566,368			566,368
ICATIONS	0			0
	38,000			38,000
G ENTITY	(391,642)			(391,642)
	12,168,303	0	0	12,168,303

Fiscal 2009/2010	1	2	3	2009/10 Estimates
22				22
1,186,032				1,186,032
18,000				18,000
286,427				286,427
15,000				15,000
5,000				5,000
0				0
128,000				128,000
190,000				190,000
0				0
0				0
4,106,000				4,106,000
0				0
2,000				2,000
252,450				252,450
31,091				31,091
0				0
(5,033,000)				(5,033,000)
1,187,000	0	0	0	1,187,000

Total IAO Budget
171
9,487,471
18,000
2,291,224
112,390
85,000
164,347
1,001,627
515,428
29,721
18,149
4,141,000
0
27,679
818,818
31,091
38,000
(5,424,642)
13,355,303

ated budget for IAO Management additional staff (these 4 FTEs are unfunded)

Business Unit	FTE	Dept from	Dept to	Employee #	Name	Position #	Classification	Salary	Benefits	Leave Approver	Sign off Authority	NSO receiver
Comm Dev	1060-7759	112-0103			Leduc, Danine	00036274	BUS LEAD	88,940.43	21,478.11	Sajko, S	Sajko, S	Sajko, S
Comm Dev	1060-7759	112-0103			Street, Randy	00047058	ADMIN O 21R	58,511.52	14,130.53	Leduc, Danine	Leduc, Danine	Leduc, Danine
Comm Dev	1060-7649	112-0103			Baldwin, Susan	00062139	ADMIN O 24	61,342.99	14,814.33	Leduc, Danine	Leduc, Danine	Leduc, Danine
Comm Dev	1060-7759	112-0103			Jones, Krista	00033275	ADMIN O 18R	47,032.75	11,358.41	Leduc, Danine	Leduc, Danine	Leduc, Danine
Comm Dev	1060-7759	112-0103			Holloway, Noreen	00078656	ADMIN O 18R	51,289.99	12,388.53	Leduc, Danine	Leduc, Danine	Leduc, Danine

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S22

FTE 5

Comm Dev	1060-7759	112-0103			Nacey, Bea	00035239	ADMIN O 24R	64,052.10	15,465.58	Leduc, Danine	Leduc, Danine	Leduc, Danine
Comm Dev	1060-7759	112-0103			Keeping, Lynne	00093438	ADMIN O 14R	47,823.66	11,501.11	Nacey, Bea	Leduc, Danine	Leduc, Danine
Comm Dev	1060-7759	112-0103			Bird, Mike	00036639	CLK 11R	43,711.57	10,556.34	Nacey, Bea	Leduc, Danine	Leduc, Danine

462,505.01

111,694.96

FTE 3

Total FTE 8

STOB	Description	
50	BASE SALARIES & OVERTIME	462,505.01
51	SUPPLEMENTARY SALARY COSTS	
52	EMPLOYEE BENEFITS	111,694.96
57	PUBLIC SERVICE TRAVEL EXPENSES	4,000.00
5901	LEGAL SERVICES	
5906	BC PUBLIC SERVICE AGENCY	8,824.00
5909	ARES RECURRING OCCUPANCY CHARGES	43,200.00
59	PAYROLL	1,029.80
5925	WTS FIXED COSTS	17,536.00
5926	WTS NEGOTIATED CONTRACT	
60	PROF SERV - OPERATIONAL & REGULATORY	
61	PROF SERV - ADVISORY	
63	INFORMATION SYSTEMS-OPERATING	960.00
65	OFFICE & BUSINESS EXPENSES	20,000.00
67	INFORMATIONAL ADVERTISING & PUBLICATIONS	
73	AMORTIZATION	
88	RECOVERIES - WITHIN GOV REPORTING ENTITY	669,749.57

Overhead

STOB	Description	
5906	PSA	1,103
5909	ARES	5,400
5925	WTS	2,192
59	Payroll	129
57	travel	500
63	cell phones	
65	training	200
65	Office Supplies & exp.	500
65	Corporate Services Support	1,800
65	Misc.	
75	Amortization	
	total	11,824

Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:24 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: 60864 FOR COMPLETION: Memo Response to Inquiries from MO re FOI Issues a

Elizabeth Vander Beesen
Manager, Access and Records Services - Natural Resource Sector
Information Access Operations
Logistics and Business Services - Shared Services BC
Ministry of Citizens' Services
Phone: 250-356-5702 Fax: 250-387-9843
email: Elizabeth.vanderbeesen@gov.bc.ca

Providing Services to:
Ministry of Aboriginal Relations
Ministry of Agriculture
Ministry of Energy
Ministry of Environment
Ministry of Forests, Mines and Lands
Ministry of Natural Resource Operations
Ministry of Transportation and Infrastructure
Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Tuesday, August 25, 2009 2:31 PM
To: Fraser, Lois A CITZ:EX
Cc: Adlhoch, Grietje A CITZ:EX
Subject: FW: 60864 FOR COMPLETION: Memo Response to Inquiries from MO re FOI Issues a

FYI

Answer to question 2 was reworded slightly but reflects what we prepared.

Marland

From: Rialp, Sheree CITZ:EX
Sent: Tuesday, August 25, 2009 2:22 PM
To: Fay, Heather CITZ:EX; Firth, Janet CITZ:EX
Cc: Plater, Sharon CITZ:EX; Grove, Marland CITZ:EX
Subject: FW: 60864 FOR COMPLETION: Memo Response to Inquiries from MO re FOI Issues

Hi Heather, Janet,

Just forwarding the latest versions of what I sent to DMO this morning, fyi.

Sheree Rialp
250 356-7481

<<<<<<<<<<<<<<<<>>>>>>>>>>>>>>>>

Page 30
SSB-2009-00017

Matt advises the information is needed by end of day August 25 into the MO.....so please first thing in the a.m. to the DMO that same day.

Many thanks....g.

From: Foran, Grace E CITZ:EX
Sent: Friday, August 21, 2009 12:28 PM
To: Nikolejsin, Dave CITZ:EX; Mateyko, Roman CITZ:EX; MacKenzie, Kelly L CITZ:EX; Lamberton, Angelina CITZ:EX
Cc: Henderson, Kim N CITZ:EX; Mitchell-Starkey, Maureen CITZ:EX; Rialp, Sheree CITZ:EX; Lutte, Nicola CITZ:EX
Subject: Request from MO: FOI Requests
Importance: High

Please will you start working on these requests (including consulting with Info Access Ops as appropriate / if need be on item 2 below) – I've a call into Matt to confirm the due date, and will relay ASAP. Thanks very much.....Grace

From: Foran, Grace E CITZ:EX
Sent: Friday, August 21, 2009 12:17 PM
To: MacInnis, Matthew CITZ:EX
Subject: RE: FOI Requests

Matt – I'm on it. When do you need this by?

From: MacInnis, Matthew CITZ:EX
Sent: Friday, August 21, 2009 12:15 PM
To: Foran, Grace E CITZ:EX
Subject: FOI Requests

Hello,

The Minister is in need of a couple FOI-related items.

- 1 – A breakdown of the recommendations made by the 2003 FOIPPA Committee and which ones we have implemented.
- 2 – A list of examples of steps Government has taken to improve FOI operations in the past 4 years.
- 3 – A list of things that government would like to do but is unable to due to the current FOIPPA. We need specific examples of how government could conceivably improve services to the public if the FOI Act was revised.

Thank you,
Matt

Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:25 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: !!DUE SEPT 1 - 4:30 p.m. -- content for single FOI slide (contained within a larger SSBC deck)

Elizabeth Vander Beesen

Manager, Access and Records Services - Natural Resource Sector

Information Access Operations

Logistics and Business Services - Shared Services BC

Ministry of Citizens' Services

Phone: 250-356-5702 Fax: 250-387-9843

email: Elizabeth.vanderbeesen@gov.bc.ca

Providing Services to:

Ministry of Aboriginal Relations

Ministry of Agriculture

Ministry of Energy

Ministry of Environment

Ministry of Forests, Mines and Lands

Ministry of Natural Resource Operations

Ministry of Transportation and Infrastructure

Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Tuesday, September 1, 2009 4:12 PM
To: Newton, Beverly CITZ:EX
Cc: Smith, Peter J CITZ:EX
Subject: FW: !!DUE SEPT 1 - 4:30 p.m. -- content for single FOI slide (contained within a larger SSBC deck)

From: Smith, Peter J CITZ:EX
Sent: Tuesday, September 1, 2009 4:10 PM
To: Grove, Marland CITZ:EX
Subject: RE: !!DUE SEPT 1 - 4:30 p.m. -- content for single FOI slide (contained within a larger SSBC deck)

A: Problem Statement

- In an Investigation of Government's FOI performance, the Information and Privacy Commissioner found that only 71% of FOI requests closed in 2008 met statutory response times.
- In order to address timeliness issues, Government announced the centralization of FOI operations in January 2009.

B: Volumes

- Despite an increase in overall FOI requests (3,138 from April 1 - Sept 1, 2009 vs 2,572 for the same period in 2008), Government has increased response times to 81% compliance.

C: Accomplishments to date:

- Centralizing and re-aligning the organizational model to allow greater flexibility of resources (ability to redeploy staff where need is greatest)
- Established and implemented standard FOI response workflow and timelines
- Implemented consistent data entry standards to track and monitor performance
- Increased diligence in managing FOI requests including enhanced escalation strategies

Peter J Smith

Director, Access & Records Service Delivery

Information Access Operations - Integrated Service Solutions

Ministry of Citizens' Services

Phone: 250-952-7357 Fax: 250-952-2650

email: Peter.James.Smith@gov.bc.ca

From: Newton, Beverly CITZ:EX

Sent: Tuesday, September 1, 2009 3:32 PM

To: Grove, Marland CITZ:EX

Cc: Fraser, Lois A CITZ:EX

Subject: !!DUE SEPT 1 - 4:30 p.m. -- content for single FOI slide (contained within a larger SSBC deck)

Importance: High

Marland,

The Critic is the audience. Please see attached a copy of what's required. Ignore the notes contained within the slide and supply your own text as per below a,b,c.

- a. Problem statement
- b. Volumes
- c. Accomplishments in terms of outcomes

Reply only with bullets/text – don't worry about finding a slide.

B

From: Beverly.Newton@gov.bc.ca [mailto:Beverly.Newton@gov.bc.ca]

Sent: Tuesday, September 1, 2009 3:23 PM

To: Newton, Beverly CITZ:EX

Subject: FOI single slide

<< File: 20090901152313.pdf >>

Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:26 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: Approve Friday pm: Minister's speaking notes - response to Estimates

Elizabeth Vander Beesen
Manager, Access and Records Services - Natural Resource Sector
Information Access Operations
Logistics and Business Services - Shared Services BC
Ministry of Citizens' Services
Phone: 250-356-5702 Fax: 250-387-9843
email: Elizabeth.vanderbeesen@gov.bc.ca

Providing Services to:
Ministry of Aboriginal Relations
Ministry of Agriculture
Ministry of Energy
Ministry of Environment
Ministry of Forests, Mines and Lands
Ministry of Natural Resource Operations
Ministry of Transportation and Infrastructure
Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Thursday, September 3, 2009 12:14 PM
To: Fraser, Lois A CITZ:EX
Cc: Newton, Beverly CITZ:EX
Subject: FW: Approve Friday pm: Minister's speaking notes - response to Estimates

Made one change to add ministry as not all FOI was centralized only the ministry staff. The other numbers came from KIS in OCIO and I think are accurate. The timelines in days are a bit of an issue Susan Wilson will discuss with you. I am heading to a 12:30 meeting downtown if needed you can reach me on my cell.

Marland

From: Fraser, Lois A CITZ:EX
Sent: Thursday, September 3, 2009 11:52 AM
To: Grove, Marland CITZ:EX
Cc: Newton, Beverly CITZ:EX
Subject: FW: Approve Friday pm: Minister's speaking notes - response to Estimates

Hi Marland, Can you please confirm the accuracy of the FOI info in the min speaking notes?

Lois Fraser
Assistant Deputy Minister
Integrated Service Solutions
Shared Services BC

Ministry of Citizens' Services
2nd Floor - 525 Superior Street
Phone: 250.387.4823 Cell: 250.888.0025 Fax: 250.952.6806
Email: lois.fraser@gov.bc.ca

 Please consider the environment before printing this email.

From: Wey, Melody PAB:EX
Sent: Thursday, September 3, 2009 11:24 AM
To: Henderson, Kim N CITZ:EX; James, Beth SSBC:EX; Hughes, Bette-Jo CITZ:EX; Mateyko, Roman CITZ:EX; Fraser, Lois A CITZ:EX
Cc: Taylor, Diane Ruth CITZ:EX; Rozario, Anna CITZ:EX; Barnes, Renee A CITZ:EX; Merrick, Keri CITZ:EX; MacKenzie, Kelly L CITZ:EX; Smith, September L CITZ:EX
Subject: Approve Friday pm: Minister's speaking notes - response to Estimates

Hello,

Please approve the attached Minister's speaking notes - response to Estimates. The speaking points highlight Service BC, multiculturalism, connectivity and FOI. Please note the highlighted bullet on page 1 (after cover) that I trust Kim can fill in.



sp_estimates2009_
10 Sept 3 09....

Thank you,
Melody

Melody Wey
Public Affairs Bureau
Ministry of Citizens' Services
Tel: 250 387-1418 / Cell: 250 812-9242
melody.wey@gov.bc.ca

Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:26 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: Question: How have budget cuts affected the information and privacy operations?

Elizabeth Vander Beesen
Manager, Access and Records Services - Natural Resource Sector
Information Access Operations
Logistics and Business Services - Shared Services BC
Ministry of Citizens' Services
Phone: 250-356-5702 Fax: 250-387-9843
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Ministry of Environment
Ministry of Forests, Mines and Lands
Ministry of Natural Resource Operations
Ministry of Transportation and Infrastructure
Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Tuesday, September 1, 2009 1:53 PM
To: Fraser, Lois A CITZ:EX
Cc: Newton, Beverly CITZ:EX
Subject: FW: Question: How have budget cuts affected the information and privacy operations?

Draft answer to Q5:

Q5. How have budget cuts affected the information and privacy operations?

The centralization of FOI and records management has allowed government to better utilize our resources, standardize and streamline processes and consolidate individual functions such as intake and processing of personal requests. As part of this we are in the process of doing a detailed process review which is scheduled to be completed by October 31, 2009.

We are exploring alternative avenues for the public to gain access to information through pro-active releases and through the use of websites, so information is more readily available.

We expect that the centralization of the program and the process review and other work we are doing will offset the budget impacts.

We remain committed to openness and accountability as our citizens expect to have access to government information in order to be informed and to hold government accountable.

From: Wey, Melody PAB:EX
Sent: Monday, August 31, 2009 1:13 PM
To: Grove, Marland CITZ:EX
Subject: Question: How have budget cuts affected the information and privacy operations?

Hello Marland,

I'm following up with one question from the FOI Centralization Q&As- do we have an answer for this question? Please let me know today, either way.

Thanks! Melody

Q5. How have budget cuts affected the information and privacy operations?



QA for minister -
Aug 18 09 co...

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QUESTIONS AND ANSWERS

Freedom of Information

Ministry of Citizens' Services

Updated: August 18, 2009

Q 1. What improvements to response times has there been since government centralized its FOI and privacy operations in January 2009?

- There have been significant improvements to FOI response times. In the first quarter of this fiscal year we have improved the on-time requests by 10% (71% on time to 81% on time).
- Since 2001, government has cut the overall response times to FOI requests in half – from 71 business days to 34 in 2008/09.

Q 2. What increases to efficiency has there been since government centralized its FOI and privacy operations in January 2009?

- Centralization has led to more flexibility in managing staff resources. Staff can be re-deployed quickly to assist in those areas where FOI request volumes are increasing.
- Better tracking and management of requests to meet timelines.

Q 3. What reduction of duplication has there been since government centralized its FOI and privacy operations in January 2009?

- Dedicated resources have been assigned to reduce duplication and overlap in managing cross government requests and consultations.
- A consolidated team approach has been developed and is being implemented to manage all “personal” FOI requests.

Q 4. How has FOI legislation been applied more consistently since government centralized its FOI and privacy operations in January 2009?

- Severing guidelines are being reviewed for consistency and accuracy and workshops will be conducted with all FOI staff.
- Standard electronic “severing” tools have been identified and will be implemented to facilitate consistency.

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QUESTIONS AND ANSWERS

- Q 5. How have budget cuts affected the information and privacy operations?**
- Q 6. Does centralizing operations mean the government will have more political control over FOI releases?**
- No. Freedom of information requests will continue to be handled by professional public servants under the terms of the legislation, free from political interference.
- Q 7. What is the current process for government to fill a FOI request?**
- Members of the public submit requests to the individual public bodies (ministries) who in turn forward them to Information Access Operations Branch or they send them to the FOI contact, listed on the Office of the Chief Information Officer web-site.
 - Ministries continue to be responsible for identifying and retrieving records.
 - Information Access Operations reviews the records for exceptions to disclosure and prepares the final release to the applicant.
- Q 8. What is the response time for FOI requests**
- Since 2001, government has cut the overall response times to FOI requests in half – from 71 business days to 34 in 2008/09.
 - Prior to 2001, responses to FOI requests took an average of 103 days.
- Q 9. How many FOI requests does government receive each year?**
- British Columbia receives three times as many requests per capita as Ontario and over four times as many as Alberta.
 - Every year, government responds to about 6,000 requests.
 - In 2008/09, government received 6,570 requests which is an increase of over 1,000 requests from the previous year.
 - The Ministry of Children and Family Development receives as many requests per year as the entire province of Alberta.
- Q 10. What are the costs for processing FOI requests:**
- The average cost of processing an FOI request has been estimated at \$2,200.

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QUESTIONS AND ANSWERS

- The average FOI request has been estimated at 500 pages.

Q 11. When was the last time the Freedom of Information and Protection of Privacy Act was updated?

- Amendments to the Freedom of Information and Protection of Privacy Act were last made in 2008.
- The Act is amended from time to time to ensure that it remains a workable and relevant document for the public, the Information and Privacy Commissioner and public bodies.

Q 12. Who does the Freedom of Information and Protection of Privacy Act apply to?

- The Act covers more than 2,800 public bodies, more than any other act in the country. Coverage includes provincial and local governments, crown corporations, school boards, universities and colleges, municipal police, hospitals, health authorities, and governing bodies of professions.
- The Act does not apply to the private sector although certain records in the custody or control of businesses under contract to public bodies may be covered.

Q 13. The B.C. government often says it has the strongest freedom of information and privacy protection legislation in Canada- how so?

- B.C.'s Freedom of Information and Protection of Privacy Act is one of the best in Canada.
- We're a leader because we provide the broadest coverage of public bodies under any Act in Canada, with over 2,800 public bodies covered.
- We have added whistle blower protection for employees who report, try to prevent, or refuse to do something they believe to be in contravention of the Act.
- We continue to review our legislation as necessary to make sure it meets the evolving needs of British Columbians.
- We successfully manage a tremendous number of FOI requests year after year. As of 2008, BC received three times as many requests per capita as Ontario and over four times as many as Alberta.



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Where ideas work

Introduction to Information Access Operations

June 2009



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Background

- Government's timeliness in responding to FOI requests has improved over the years
- Average # of days to process a request from 71 days in 2001 to 35 days in 2008
- However, several ministries still not responding in a timely fashion; overall, only 71% of FOI requests were closed on time in 2008
- OIPC has expressed concerns in 2007 and 2008 reports, and refers to delays as a "serious and ongoing problem"



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F 2

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Centralization

- To improve performance, decision made in January 2009 to centralize FOI, privacy and records management offices across government
- Information Access Operations (IAO) is a single work unit within Shared Services BC, reporting to Integrated Service Solutions
- 172 FTEs and a projected budget of \$13.4 million
- IAO staff currently located in 13 different locations



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To lead and deliver optimal service to our client ministries in assisting them to fulfill their statutory obligations.*

* Freedom of Information and Protection of Privacy Act (FOIPPA),
Document Disposal Act (DDA)

* Core Policy and Procedures Manual (CPPM), Chapter 12 (management of
information within the provincial government's control and/or custody)



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FOI Operations

- FOI access request processing
- FOI client awareness
- Advisory services; e.g., Executive briefings
- Performance reporting
- Business process reviews
- Encourage opportunities for pro-active release
- Operational policy

Records Management

- Administration of the Document Disposal Act
- Appraisal - Determine on behalf of government which records have ongoing archival value
- Operational Records Classification System (ORCS) development
- Administrative Records Classification System maintenance
- Electronic records keeping systems implementation and administration
- Off-site records storage and destruction
- Manage records related projects

Privacy Operations

- Advise on Privacy Impact Assessments and Information Sharing Agreements
- Manage Privacy breach incidents
- Report to OIPC regarding inappropriate release of personal information
- Privacy client awareness
- Advisory services; e.g., Executive briefings
- Ensure alignment between privacy policy, privacy operations and information security





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Benefits of Centralization

- Many benefits of centralization including consistency in processes, elimination of duplication, and reassignment of resources to meet workload demands
- Working on both business transformation and organizational design to create a client service and performance management organization
- Performance targets, including timelines for each step in the FOI process, are tracked and reported
- Target is 100% FOI requests completed within legislated timelines



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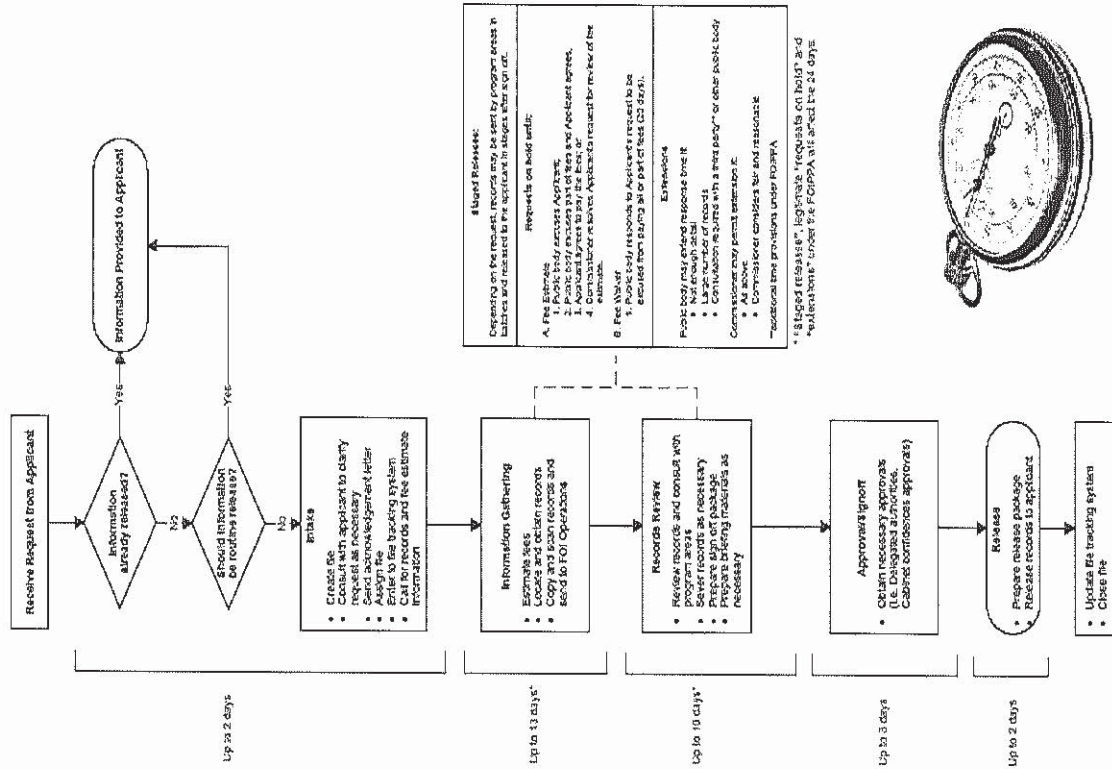
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Freedom of Information Request Process Steps and Timelines



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IAO Workplan

IAO Organizational Design

June 30, 2009

- Transfer of Budget and Staff
- Develop Operating principles and business outcomes
- Define Roles and Responsibilities (e.g., Client Ministries)
- Develop New Organizational Chart
- Initiate Facilities planning

FOI Best Practice Improvement Plan

- Implement Quick Wins

July 10, 2009

- ~ (e.g. Staff redeployment, Weekly Performance, Reporting, Streamline Signoff)

- Design and Implement Process Improvements

Present – Dec 31, 2009

- ~ (e.g. Pro-Active Release, Case Management, Workflow Improvement, Consistent severing, Consistent application of the legislation)



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Records Management Improvement Strategy

Present -Feb 25, 2010

- Consolidate Records Management Services
- Implement Electronic Document RM System
- Consolidate Records Classification

Performance Reporting Framework

Present – Sept 30, 2009

- Establish Performance Reporting
- Establish Requirements and Metrics
- Develop Sample Reports

Privacy / Security Opportunity Assessment

Jan 11, 2010

- Review of privacy and security business processes
- Determine opportunities for alignment



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Consolidated Request Intake
OIPC Reviews, X Govt Request
Management

Consolidated Personal
Request Management

Consolidated Privacy
Management

Consolidated Records
Management Services

New Ministry Teams - from 12 to 5 (General requests, RM and advisory services)



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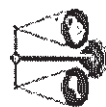
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Key Priorities

- Business process improvements including case management, workflow and proactive release/transparency
- Organizational redesign based on client needs, business outcomes and staff input/communication
- FOI timelines – weekly performance reports; 74% of requests closed on time





Freedom of Information and Protection of Privacy Information Access Operations

Year To Date Performance Report % OnTime Report

[Closed, Closed OnTime, Closed Overdue, % OnTime]

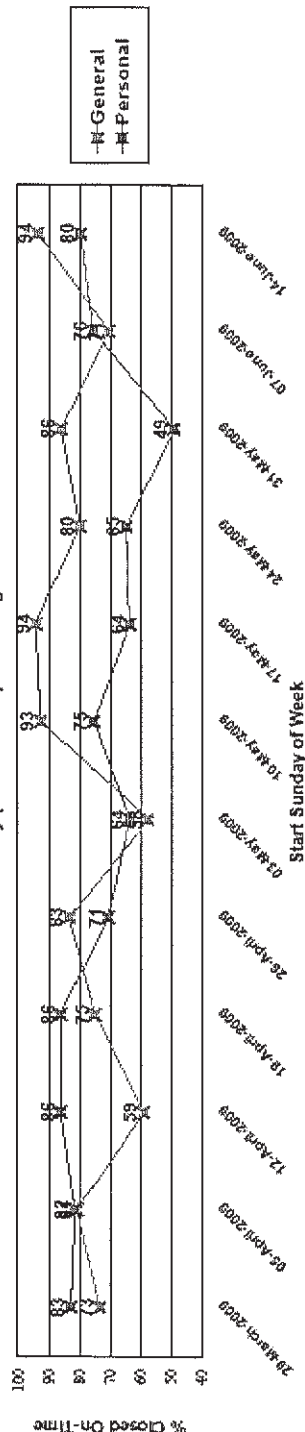
Reporting period: 01-April-2009 to 21-June-2009

Note:
This Year to Date Performance report tracks all FOI requests closed for all ministries from the beginning of the year to the current date. It indicates the year to date number and percentage of requests closed on time and the number and percentage of requests that were overdue when they were closed.

General and personal requests are reported separately by ministry and in summary. The graph shows a trend line representing the percentages of general and personal requests closed on time on a week to week basis.

Please note: This report only provides statistics where there have been processing activities within ministries. For example, if no requests have been closed within a ministry during the reporting period, that ministry will not appear under either the "General" or "Personal" categories.

Percentage of Requests Closed On-Time
Weekly (Year to Date) Percentages



	Annual (Year to Date) Totals and Percentages			
	Closed	Closed On Time	Closed Overdue	% On Time
General	358	285	71	80%
Personal	1285	934	351	73%
Total	1641	1,219	422	74%



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Percentage of requests closed on time

	<u>2008</u>	<u>2009*</u>
Generals	62%	80%
Personals	75%	73%**

* April 1, 2009 to date

** Primary issue is backlog in PSSG/Corrections files



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BC Public Service

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Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:28 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: !!URGENT DUE Sept 3 10:00 a.m. - new version with # of direct reports FW: IAO Org structure

Elizabeth Vander Beesen

Manager, Access and Records Services - Natural Resource Sector

Information Access Operations

Logistics and Business Services - Shared Services BC

Ministry of Citizens' Services

Phone: 250-356-5702 Fax: 250-387-9843

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Ministry of Energy

Ministry of Environment

Ministry of Forests, Mines and Lands

Ministry of Natural Resource Operations

Ministry of Transportation and Infrastructure

Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Thursday, September 3, 2009 8:18 AM
To: Newton, Beverly CITZ:EX
Cc: Fraser, Lois A CITZ:EX; Adlhoch, Grietje A CITZ:EX
Subject: RE: !!URGENT DUE Sept 3 10:00 a.m. - new version with # of direct reports FW: IAO Org structure

Attached. I took out the classification levels for the managers as it seemed awkward.

Marland



IAO Org.pdf

From: Newton, Beverly CITZ:EX
Sent: Wednesday, September 2, 2009 3:36 PM
To: Grove, Marland CITZ:EX
Cc: Fraser, Lois A CITZ:EX; Adlhoch, Grietje A CITZ:EX
Subject: !!URGENT DUE Sept 3 10:00 a.m. - new version with # of direct reports FW: IAO Org structure
Importance: High

Marland,

As discussed, the CEO's office requires another version of this org chart, to be used by the Minister in opposition briefing, showing only number of direct reports from Manager level and below. So, please:

- Take out all names
- Keep the manager level
- Provide only the number of reports for manager level and down

Thanks,

Beverly

From: McDonald, Randy J CITZ:EX
Sent: Wednesday, September 2, 2009 10:24 AM
To: Newton, Beverly CITZ:EX
Subject: FW: IAO Org structure

Randy McDonald
Executive Director
Shared Services BC
250.952.6812 (office)
250.217.8791 (mobile)

From: Rozario, Anna CITZ:EX
Sent: Wednesday, September 2, 2009 9:28 AM
To: McDonald, Randy J CITZ:EX; Woodward, Hilary C CITZ:EX
Subject: FW: IAO Org structure

From: Fraser, Lois A CITZ:EX
Sent: Wednesday, September 2, 2009 9:23 AM
To: James, Beth CITZ:EX
Cc: Rozario, Anna CITZ:EX; Barnes, Renee A CITZ:EX; Sajko, Sandra CITZ:EX
Subject: FW: IAO Org structure

This is the new organization chart for Information Access Operations and reflects the changes since Work Force Adjustment.

<< File: IAO Org structure - 2009-09-01.pdf >>

Business Outcomes

1. Timely, accurate and appropriate release of government information in response to FOI requests;
2. A coordinated and proactive release strategy that reduces the need for FOI requests;
3. A fully implemented, consistent records management program that supports government business throughout the lifecycle of a record;
4. A work environment that fully supports employee engagement and the BC Public Service Values; and
5. An effective and aligned approach to information security and privacy protection management.



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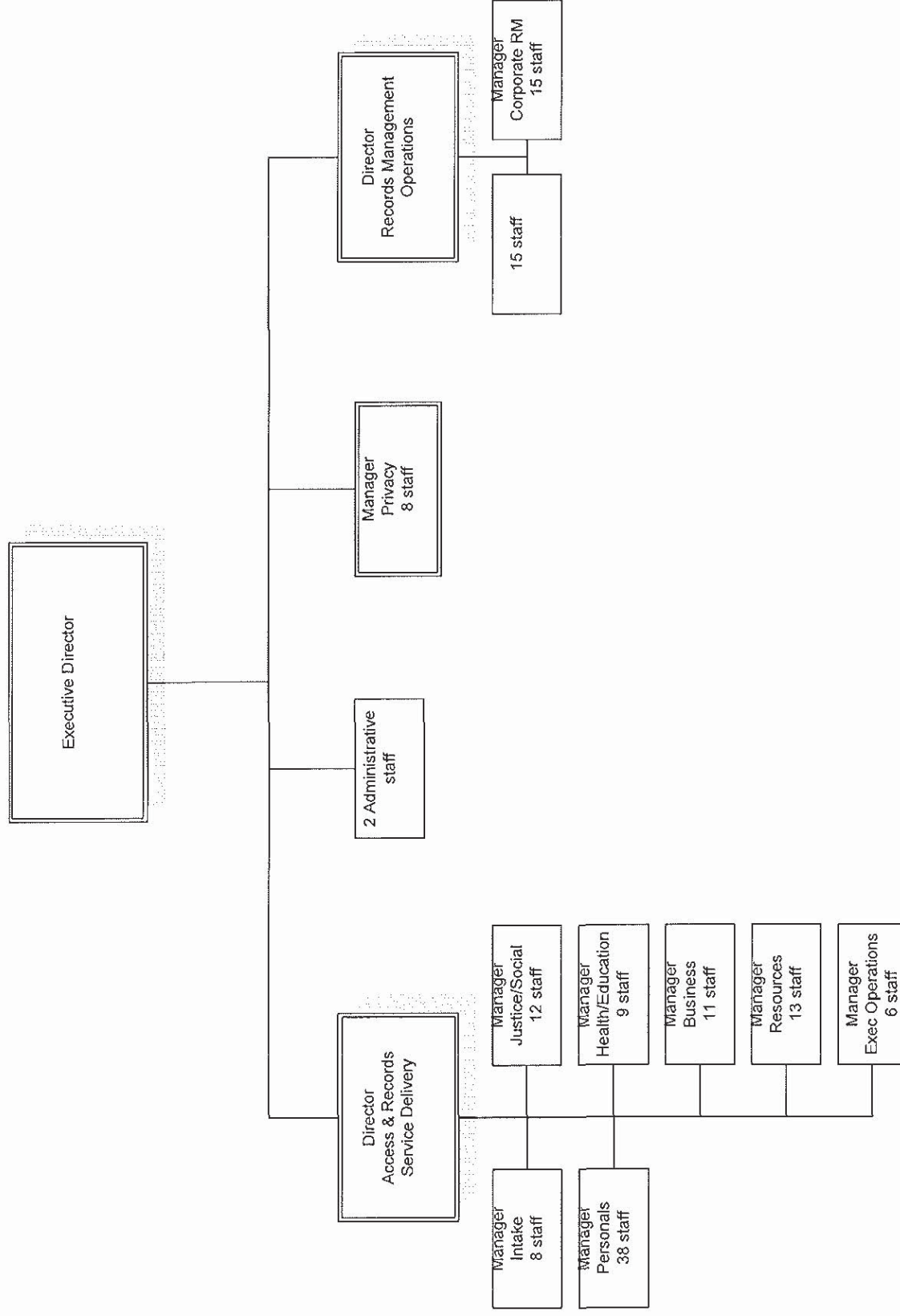
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Information Access Operations



Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:28 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: CONFIRM CHANGES: RE: Approve Friday pm: Minister's speaking notes - response to Estimates a

Elizabeth Vander Beesen
Manager, Access and Records Services - Natural Resource Sector
Information Access Operations
Logistics and Business Services - Shared Services BC
Ministry of Citizens' Services
Phone: 250-356-5702 Fax: 250-387-9843
email: Elizabeth.vanderbeesen@gov.bc.ca

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Ministry of Environment
Ministry of Forests, Mines and Lands
Ministry of Natural Resource Operations
Ministry of Transportation and Infrastructure
Environmental Assessment Office

From: Fraser, Lois A CITZ:EX
Sent: Thursday, September 3, 2009 2:58 PM
To: Grove, Marland CITZ:EX; Newton, Beverly CITZ:EX
Subject: RE: CONFIRM CHANGES: RE: Approve Friday pm: Minister's speaking notes - response to Estimates a

Wording approved.

Lois Fraser
Assistant Deputy Minister
Integrated Service Solutions
Shared Services BC

Ministry of Citizens' Services
2nd Floor - 525 Superior Street
Phone: 250.387.4823 Cell: 250.888.0025 Fax: 250.952.6806
Email: lois.fraser@gov.bc.ca

 Please consider the environment before printing this email.

From: Grove, Marland CITZ:EX
Sent: Thursday, September 3, 2009 2:45 PM
To: Newton, Beverly CITZ:EX; Fraser, Lois A CITZ:EX
Subject: RE: CONFIRM CHANGES: RE: Approve Friday pm: Minister's speaking notes - response to Estimates

Yes suggest this be deleted and that we add:

- Since January when the government's information and privacy operations were centralized we have improved response times from 71% to 81% within legislated timelines.

Marland

From: Newton, Beverly CITZ:EX
Sent: Thursday, September 3, 2009 12:31 PM
To: Fraser, Lois A CITZ:EX
Cc: Grove, Marland CITZ:EX
Subject: CONFIRM CHANGES: RE: Approve Friday pm: Minister's speaking notes - response to Estimates

Please confirm:

Changes are on page 7.

I just spoke with Susan & the recommendation (same as in the Q&A's) is to remove this paragraph:

- Since 2001, government has cut the overall response times to FOI requests in half – from 71 business days to 34 in 2008/09 and over the coming year we will work to do even better.

Please confirm.

From: Grove, Marland CITZ:EX
Sent: Thursday, September 3, 2009 12:14 PM
To: Fraser, Lois A CITZ:EX
Cc: Newton, Beverly CITZ:EX
Subject: FW: Approve Friday pm: Minister's speaking notes - response to Estimates

Made one change to add ministry as not all FOI was centralized only the ministry staff. The other numbers came from KIS in OCIO and I think are accurate. The timelines in days are a bit of an issue Susan Wilson will discuss with you. I am heading to a 12:30 meeting downtown if needed you can reach me on my cell.

Marland

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Sent: Thursday, September 3, 2009 11:52 AM

To: Grove, Marland CITZ:EX
Cc: Newton, Beverly CITZ:EX
Subject: FW: Approve Friday pm: Minister's speaking notes - response to Estimates

Hi Marland, Can you please confirm the accuracy of the FOI info in the min speaking notes?

Lois Fraser
Assistant Deputy Minister
Integrated Service Solutions
Shared Services BC

Ministry of Citizens' Services
2nd Floor - 525 Superior Street
Phone: 250.387.4823 Cell: 250.888.0025 Fax: 250.952.6806
Email: lois.fraser@gov.bc.ca
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From: Wey, Melody PAB:EX
Sent: Thursday, September 3, 2009 11:24 AM
To: Henderson, Kim N CITZ:EX; James, Beth SSBC:EX; Hughes, Bette-Jo CITZ:EX; Mateyko, Roman CITZ:EX; Fraser, Lois A CITZ:EX
Cc: Taylor, Diane Ruth CITZ:EX; Rozario, Anna CITZ:EX; Barnes, Renee A CITZ:EX; Merrick, Keri CITZ:EX; MacKenzie, Kelly L CITZ:EX; Smith, September L CITZ:EX
Subject: Approve Friday pm: Minister's speaking notes - response to Estimates

Hello,

Please approve the attached Minister's speaking notes - response to Estimates. The speaking points highlight Service BC, multiculturalism, connectivity and FOI. Please note the highlighted bullet on page 1 (after cover) that I trust Kim can fill in.

<< File: sp_estimates2009_10 Sept 3 09.doc >>

Thank you,
Melody

Melody Wey
Public Affairs Bureau
Ministry of Citizens' Services
Tel: 250 387-1418 / Cell: 250 812-9242
melody.wey@gov.bc.ca

Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:29 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: FOR REVIEW: FOI Q&As 2

Elizabeth Vander Beesen

Manager, Access and Records Services - Natural Resource Sector

Information Access Operations

Logistics and Business Services - Shared Services BC

Ministry of Citizens' Services

Phone: 250-356-5702 Fax: 250-387-9843

email: Elizabeth.vanderbeesen@gov.bc.ca

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Ministry of Aboriginal Relations

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Ministry of Environment

Ministry of Forests, Mines and Lands

Ministry of Natural Resource Operations

Ministry of Transportation and Infrastructure

Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Tuesday, August 18, 2009 1:15 PM
To: Van Dusen, Mary Ellen CITZ:EX
Cc: Adlhoch, Grietje A CITZ:EX; Smith, Peter J CITZ:EX; Smith, September L CITZ:EX
Subject: FW: FOR REVIEW: FOI Q&As 2

Revised question 7.

Marland

From: Grove, Marland CITZ:EX
Sent: Tuesday, August 18, 2009 11:12 AM
To: Smith, September L CITZ:EX
Cc: Adlhoch, Grietje A CITZ:EX; Van Dusen, Mary Ellen CITZ:EX
Subject: RE: FOR REVIEW: FOI Q&A

Attached is a draft of our answers. We did not answer question 5 dealing with cuts. Also I understand that these went to the OCIO for input, I suspect just questions 11, 12 and 13. Will need to coordinate with their response.

Marland



Q&A for minister
- Aug 17 09 c...

From: Smith, September L CITZ:EX
Sent: Monday, August 17, 2009 2:38 PM
To: Grove, Marland CITZ:EX
Cc: Adlhoch, Grietje A CITZ:EX; Van Dusen, Mary Ellen CITZ:EX
Subject: FW: FOR REVIEW: FOI Q&A
Importance: High

From: Greer, David PAB:EX
Sent: Monday, August 17, 2009 2:30 PM
To: Fraser, Lois A CITZ:EX; MacKenzie, Kelly L CITZ:EX
Subject: FOR REVIEW: FOI Q&A
Importance: High

<< File: Q&A for minister - Aug 17 09.doc >>

Hello, Minister Stewart asked us for an FOI Q&A. And this is what we have compiled from myriad sources. Wondering if someone in your shops could take a look and review before we send it on.

All the best,
David

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Thomas, Marilyn SSBC:EX

From: Vander Beesen, Elizabeth H SSBC:EX
Sent: Thursday, October 27, 2011 3:29 PM
To: Thomas, Marilyn SSBC:EX
Subject: FW: For your review/Comment - budget

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Providing Services to:
Ministry of Aboriginal Relations
Ministry of Agriculture
Ministry of Energy
Ministry of Environment
Ministry of Forests, Mines and Lands
Ministry of Natural Resource Operations
Ministry of Transportation and Infrastructure
Environmental Assessment Office

From: Grove, Marland CITZ:EX
Sent: Tuesday, September 1, 2009 1:39 PM
To: Vander Beesen, Elizabeth H CITZ:EX
Subject: RE: For your review/Comment - budget

HOW HAVE BUDGET CUTS AFFECTED THE FOI AND PRIVACY OPERATIONS

The centralization of FOI and records management has allowed government to better utilize our resources, standardize and streamline processes and consolidate individual functions such as intake and processing of personal requests. As part of this we are in the process of doing a detailed process review which is scheduled to be completed by October 31, 2009.

We are exploring alternative avenues for the public to gain access to information through pro-active releases and through the use of websites, so information is more readily available.

We expect that the centralization of the program and the process review and other work we are doing will offset the budget impacts.

We remain committed to openness and accountability as our citizens expect to have access to government information in order to be informed and to hold government accountable.

From: Vander Beesen, Elizabeth H CITZ:EX
Sent: Tuesday, September 1, 2009 1:18 PM
To: Grove, Marland CITZ:EX
Subject: For your review/Comment - budget

For your review/Comment:

HOW HAVE BUDGET CUTS AFFECTED THE FOI AND PRIVACY OPERATIONS

- We are developing comprehensive strategies to improve the Information and Privacy Program. These include better utilizing of our resources, increasing the use of automation, increased awareness and accountability, and establishing benchmarks to improve our performance.
- The ministry is undertaking a detailed process review, based on best practices, which will be completed at the end of October 2009 in which we are examining and implementing opportunities to streamline current processes. We are in the midst of establishing two consolidated operations within the program, one for the intake of FOI requests and the other for responding to requests for personal information.
- We are exploring alternative avenues for the public to gain access to information through pro-active releases and through the use of websites, so information is more readily available.
- It is expected the work we are completing, and the centralization of the program which took place in January 2009, will off-set any budget impacts which would have affected the FOI operations.
- When the Office of the Information and Privacy Commissioner released their 2008 report, the Honourable Iain Black, stated how government's obligation was not just to follow the Act, but also to do so in a timely manner. This commitment has not and will not change. We remain committed to openness and accountability as our citizens expect to have access to government information in order to be informed and to hold government accountable.

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Integrated Service Solutions (ISS) Division
Ministry of Citizens' Services

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The FOI 100 per cent plan

Agenda

FREEDOM OF INFORMATION – TARGETTING 100% COMPLIANCE

- Government closed 5,999 FOI requests in 2008
- Only 71% were responded to on time

General intro

- Previous state
 - Separate and independent FOI/records shops (12 in all, 145 employees)
 - Inconsistent policies, practices, processes and staffing levels
 - 12 physical locations
 - Inconsistent performance (71% average compliance across govt)
 - Inconsistent corporate tracking and reporting
- Timeline
 - Jan 12: ministry announcements to DM's
 - Jan 27: ED in place
 - Feb XX: initial transition team in place
 - June 17: transferred to ISS from OCIO

MAIN CAUSES OF DELAY

- **Process inefficiency**
 - Remedy: Business transformation and process re-engineering
- **Inefficient management of resources (people and tools)**
 - Remedy: Consolidation, re-deployment and flexibility of staff based on requirements and priorities
 - Remedy: Consistent and effective use of tools and technology
- **Program area challenges/delays in identifying and retrieving records and providing disclosure recommendations**
 - Remedy: Ministry designated FOI/Records Contacts for all program areas; Ministry compliance with corporate records management policies.
- **Lack of FOI/records training and awareness in ministries**
 - Remedy: Executive messaging in ministries; Increased focus on training and awareness

General intro

- Volume trends
 - numbers to be provided by Peter (Q1 comparisons 08/9 vs. 09/10)
- What does 100% mean / how achievable is it?
 - Already had overdue so cannot reach annual target for 09/10
 - Confirm what has been committed (cabinet)
 - Clarify / manage expectations – what's acceptable?

General intro

- Placeholder – key reasons for delay and challenges faced
- Both within and outside control (partnership with ministries)
- Review of cross Canada best practices was completed
- Improvements made to reporting and performance management

Intake

- Previous state:
 - haphazard approach to dedicated intake function
 - delays in moving requests from intake to processing
 - limited resources with limited backup
- Future State:
 - Dedicated team, one location, consistent data entry
 - Triage of request on intake (to determine validity, precedent, routine release, clarification etc)
 - coordination of cross govt requests at intake
- Accomplishments:
 - intake staff working group established to review internal best practice
 - established team lead for new consolidated intake (one stop shop)
 - performance management improvements made
 - established government wide data entry standards
- Plan for moving forward:
 - Proactive release strategies
 - Publish previously released requests
 - Employee transition into new roles, training
 - Business processes reengineered
 - Citizen website
 - New tools (e.g. TRIM)
- Process risks:
 1. Requests delayed in ministries before they get to IAO
 2. No control over volume
 3. Lack of progress on proactive release
- Mitigation strategies:
 1. Client communication
 2. Redeployment of staff to address peaks in volume, enhanced use of fees
 3. Proactive release commitment
- Asks:
 - A. SSBC support:
 - a) with central website
 - b) new tools / enhancements
 - B. Ministry commitment to proactive release strategy
 - C. Opportunity to amend fee schedule to include application fees (like Alberta)

Information Gathering

- Previous state:
 - haphazard approach to gathering records
 - few designated program area contacts
 - lack of resources in ministries for records gathering
 - lack of tools in program areas (e.g. scanners, TRIM)
 - inconsistent / underused existing technologies
 - Inconsistent compliance with corporate records management policies (records classification / retention)
- Future State:
 - Designated program area FOI / records contacts (e.g. M of ENV)
 - Better use of existing and new technology (e.g. Scan at source)
 - Enhanced staff awareness of FOI and records requirements
- Accomplishments:
 - Communicated turnaround time requirements to program areas
 - Enhanced data entry and timeline tracking to identify delays
- Plan for moving forward:
 - Program contacts defined and trained on expectations
 - Project management and escalation process defined
 - Business processes reengineered
 - New tools (e.g. TRIM)
 - Training strategy for designated individuals.
- Process risks:
 1. Ministries not having dedicated contacts or records resources in program areas when needed.
 2. Ministries not having tools available (i.e. MFD's / scanning capability)
 3. Lack of records policy adherence.
- Mitigation strategies:
 1. Secure designated contacts, train them.
 2. Investigate office equipment and technology across locations.
 3. Corporate records management policy training and awareness.
- Asks:
 - A. OCIO rollout of cross government records policy awareness training.
 - B. Commitments from ministries to electronic transfer of records where possible.
 - C. Ministry designated FOI / records program contacts (like ENV)

Records Review

- Previous state:
 - Inconsistent approaches to records review, analysis, and severing leading to inefficiencies
 - No sharing of resources between ministries
 - Inconsistent use or lack of tools and technology (e.g. severing software)
 - Inconsistent interpretation and application of legislation
 - Inadequate and inconsistent harms assessment and recommendations from ministries
- Future State:
 - Consistent approach to all of the above
 - More involvement of ministry staff in harms assessment and recommendations to ensure informed decision-making
 - Consistent project management approach to managing FOI requests
- Accomplishments:
 - Completed review of severing tools and technology
 - Established process review working groups to identify and recommend best practices (e.g. Consultation process)
 - Developed standardized ministry teams for consistently managing general and personal FOI requests
 - Created dedicated position for managing Cabinet consultations
 - Implemented data entry standards to facilitate the project management process
- Plan for moving forward:
 - Asks:
 - A. Dedicated contacts in ministry

Process risks:

1. Lengthy consultation processes between ministries
2. Volume of FOI requests
3. Lack of involvement of ministry staff in process
4. Inadequate documentation to support decision making

Mitigation strategies:

1. Streamlined consultation processes
2. Better use of project management tools (e.g. Extensions, fee estimates)
3. Dedicated contacts in ministry program areas
4. Consistent harms assessment documentation (e.g. Checklist)

Approval/Signoff

- Previous state:
 - Inconsistent approval/signoff processes across ministries (various delegation levels)
 - Lack of harms assessment documentation
- Future State:
 - Consistent approval/signoff processes
 - Improved harms assessment and signoff documentation
- Accomplishments:
 - Developed recommendations for consistent approval/signoff
 - Developed draft records review, issues assessment process and checklist
 - Participated in PAB FOI working group to collaborate on parallel issues assessment and issues management process
- Plan for moving forward:
 - Obtain approval for new approval/signoff processes
 - Develop consistent guidelines for ministry staff to assist with records review
 - Provide training to IAO and ministry staff with regard to discretionary decision making
 - Build ministry confidence in records review and recommendation process
- Process risks:
 1. Signoff delays
- Mitigation strategies:
 1. IAO staff manage timelines and escalate as required
 2. Delegate to the lowest appropriate level for personal and basic requests
- Asks:
 - A. Option for flexibility and delegation of signoff at the discretion of Deputy Ministers
 - Review and confirm delegation matrix and identify signoff authorities