Questions:
Jennifer Peddle
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Call for for Records Checklist

Division FOI Contact/MDO

As the designated point of contact for any FOIs assigned to your program area, you assume responsibility for the adequacy of search activities within your section

- ☐ Determine validity of request and/or clarify scope
  - ☐ Is there a clear and consistent understanding of what is being requested so the search can be focused?
  - ☐ Have I requested clarification from IRMT on the interpretation and/or scope of this request where it is unclear?
- ☐ Consider whether a fee estimate should be prepared before staff search for records
  - ☐ Based on the current scope of the request, will a search for records place an unreasonable burden on staff?
- ☐ Identify the appropriate staff to prepare a fee estimate / conduct a search for records
  - ☐ Did I refer this request to experienced staff with knowledge of the subject matter?
  - ☐ Did I notify administrative staff to assist with any searches in CLIFF* and/or CRMS* and/or the retrieval of any offsite records?
  - ☐ Did I consider whether there are any responsive records in my custody to be provided?
- ☐ Raise profile of request to Executive Director if contentious or especially complex
  - ☐ Should the ED review our response to this request before ADM sign-off?
- ☐ Provide additional information to assist CITZ.FOIRequests@gov.bc.ca in their search
  - ☐ Are there other divisions or offices within the ministry that may have responsive records?
  - ☐ Are there other ministries or public bodies that may have responsive records?
  - ☐ Are there any responsive materials available online or for purchase?

Program Staff (i.e. Analysts, Advisors, Specialists, Officers, etc.)

As the subject matter expert with first-hand knowledge of the requested information, you assume responsibility for undertaking a thorough and accurate search to locate potential records

- ☐ If applicable, provide **fee estimate** information to your MDO/FOI Contact and await further direction
  - ☐ Will the search time exceed 3 hours and/or volume exceed 300 pages?

  (If yes, refer to Guide to Fee Estimate for more information on this process)
- ☐ Confirm scope of request to define own search parameters
  - ☐ Are my records within the specified date range for records search?
  - ☐ Did I use relevant search terms to conduct my search?
  - ☐ Do my responsive records reflect what the applicant has requested?

  i.e. communications, draft materials, all records…

- ☐ Consider all possible search areas
  - ☐ Outlook (emails, meeting details, attachments, Lync messages, etc)
  - ☐ Shared drives (e.g. LANs) and personal drives (e.g. desktops)
  - ☐ Physical records located in offsite storage*
  - ☐ CLIFF*, CRMS*, TRIM, eApprovals
  - ☐ Text messages, phone logs
  - ☐ Notebooks, working files, loose documents, binders and boxes at workstation
  - ☐ Removable electronic storage decisions
  - ☐ SharePoint sites
  - ☐ Other information databases/applications (i.e. CAS, etc.)
- ☐ Gather all records (official and/or transitory) in my custody that are responsive to the request
  - ☐ Even records that are half-finished, still in draft form, currently involved in ongoing arbitration, active investigation, or contain sensitive/contentious information, it all must be submitted!
  - ☐ Did I review search results, file numbers and/or content lists to confirm responsiveness?
- ☐ Complete an informative harms assessment on the records
  - ☐ Did I provide enough information on potential harms and/or sensitivities for the ADM and/or DM to make an informed decision on disclosure?
- ☐ Send responsive records with harms onto your MDO/FOI Contact
  - ☐ send via email or eApproval
- ☐ Provide details of search strategy to via your MDO/FOI Contact
  - ☐ Could I defend the adequacy of my search in the event of a complaint?

*CRMS is a records management system used for managing physical records. If you are unfamiliar with completing a search in CRMS and/or retrieving records from offsite storage, please request assistance from the administrative support within your program area or ask Information and Privacy Coordinator.

*CLIFF is system used for logging and tracking correspondence and sometimes document management. If you are unfamiliar with where correspondence records are filed in your program area, please request assistance from the administrative support
within your program area.

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Call for Records: Guide to Completing an Information Harms Assessment

Overview

The Freedom of Information and Protection of Privacy Act (FOIPPA) compels the provincial government to make records in its possession publicly available upon request unless doing so would be harmful to government or a third party.

FOIPPA contains provisions for certain types of 'harmful' information to be withheld – these provisions are referred to as Exceptions to Disclosure. In providing the public with access to as much information as possible, FOIPPA requires public bodies to sever from a record any information that is subject to an exception, and to release the rest of the information which does not qualify for an exception.

What are Harms?

In the context of FOIPPA, harms are understood to have a real and negative effect, such as causing injury or damage, impeding achievement of a desired outcome, or undermining success by creating additional challenges. Harms must be concrete and specific to the subject matter and represent a probable outcome of release.

Who Identifies Harms?

Harms are best to be completed by the "knowledgeable owners' of the records (e.g. program staff who are familiar with the subject matter and understand what consequences/implications may occur upon disclosure).

IAO will complete a line-by-line review of the records to identify any obvious exceptions to disclosure (i.e. personal harms, cabinet documents, etc.); however, IAO relies on you - the experts in your field – to provide context and a program perspective on disclosure.

Role of a Harms Assessor

When assessing harms, you must identify any information contained within the records that could attract harms or attention upon release. This involves flagging any information for IAO that may qualify for an exception under FOIPPA and flagging any information for ministry executive and communications staff that does not qualify for an exception but may still be contentious. The information you provide here is information that will inform your ADM/DM when signing off on the release.

Harms and/sensitivities can be identified using any of the following methods:

1. Using Adobe's Comment & Markup Tool
2. Completing the harms section in the Call for Records Form
3. Sending us an email that details your concerns

***Please note** that you are not required to apply FOIPPA sections – simply let us know if any of the following harms might apply

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What is considered 'harmful' Information?

- **Cabinet confidences (s.12)**
  - i.e. Draft or final information prepared for cabinet where a decision has yet to be reached on the issue
- **Third party business interests (s.21)**
  - i.e. Proprietary information about a third party that was supplied to the public body in confidence
- **Third party personal privacy (s.22)**
  - i.e. Personal information about an identifiable individual
- **Policy advice or recommendations (s.13)**
  - i.e. Information containing a suggested course of action or plan that has not yet been implemented
- **Legal advice (s.14)**
  - i.e. Discussions subject to client-solicitor privilege or where there are pending court actions/litigation concerned
- **Law enforcement matters (s.15)**
  - i.e. Information related to ongoing investigations, specialized investigative tactics, or confidential sources of information
- **Intergovernmental relations (s.16)**
  - i.e. Information received in confidence from another local, provincial, federal or aboriginal government, or information related to the conduct of negotiations
- **Economic/ financial interests of a public body (s.17)**
  - i.e. Ongoing negotiations for contracted services, management/administration of government personnel, investing strategies, etc.
- **Conservation of protected sites or endangered species (s.18)**
  - i.e. Information that would interfere with the protection/conservation of heritage sites and/or endangered, threatened or rare living resources
- **Safety of an individual or the public (s.19)**
  - i.e. Information which if disclosed would threaten the public safety or an individual's safety, mental or physical health
- **Is or will be released in 60 days (s.20)**
  - i.e. Information currently available online for free or for purchase, or information that will be made public in 60 days *Note: you must make the **60-day** deadline for publication of records or the FOI request will be reopened.*

What is considered 'sensitive' Information?

Records that are not explicitly harmful may nonetheless contain contentious information related to the following issues:

- Impacts to relations with First Nations or other key stakeholders
- High interest to media or the public
- Comments that could bring the public service into disrepute
- Comments that may require clarification on government policies or direction
- Any other information of interest to elected officials or ministry executive

BRITISH COLUMBIA | Ministry of Citizens' Services

REAL PROPERTY DIVISION

OPEN DATA TOOLKIT

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CHANGE LOG

DATE	NAME	CHANGE
2021-11-04	NIKHIL BHATNAGAR	DATE CREATED

RPD OPEN DATA TOOLKIT

Context	
Context	This toolkit will help you understand what open data is, its importance and how you can create and release an open data set. Check out the sections below to get a better understanding of Open Data and start creating your data set. Policy – get started by learning about open data and reviewing the BC Open Information Open Data Policy. Planning – learn the importance of Open Data at RPD and begin preparing your data set. Publishing your data – Learn the final steps to publish your data set for everyone to see. Resources – Use the resources provided to help and complete your data set. Data BC - enables the strategic management and sharing of data across the government and with the public. It is responsible for the BC Data Catalogue, the Open Data initiative, and the B.C. Spatial Data Infrastructure. BC Data Catalogue - Is the place to find, explore and access data, services and applications that have been published by BC Government and Broader Public Sector organizations. If you are looking for technical or other support, please contact Data BC or check out their website.

Policy	
What is open data	Open data is data or content that is open to anyone, it is free to use, reuse, and redistribute. It is structured machine-readable data which exists in many forms such as datasets, survey results, and metadata. Open government data is produced and commissioned by government or government-controlled entities, it allows for governments to be transparent, efficient and promote economic and social growth. It does not include personal data or is sensitive or private government information.
Why data is important	Governments collect significant amounts of data. This data has intrinsic economic and social value. With consideration of commercial, privacy and security sensitivities, there are studies showing that releasing government data publicly in

easily shared and readable formats, can fuel business activity, increase public sector efficiency, and provide better support for evidence-based policy development.

There are many benefits to open data such as providing opportunities to collaborate, promote future research and growth, and strengthen the economy.

Some key benefits include:

- Open Data supports public oversight of governments and helps reduce corruption.
- It provides new opportunities for governments to collaborate with citizens and allows them to engage with their governments and contribute to the improvement of public services.
- It can help empower citizens to make informed decisions, to build and grow their business and to better understand issues.

- Governments are the biggest re-users of open government data, and open data makes it easier and less costly for government ministries to discover and access their own data or data from other jurisdictions.

Highlights from British Columbia Open Data/Information policy	Making government data available online invites individuals, businesses, and organizations in BC to innovate and collaborate with the government. Data BC is responsible for the BC Data Catalogue, which is BC's portal to access the governments release of open data. There are over 3000 datasets in the B.C. Data Catalogue and are free for anyone to use or re-purpose under the Open Government Licence for British Columbia. Not all data can be open data, sometimes the government is unable to release certain data because of certain restrictions, such as: • **Privacy:** A dataset or information that contains personal information or information that could identify an individual must not be released. • **Security:** Information or data that may pose security risks to the government, or to vulnerable or targeted individuals or organizations • **Confidentiality:** Information or data that impairs the government's ability to make some decisions cannot be released. • **Legacy information or data:** Sometimes there is a substantive cost to making the resource eligible for release and there may not be a huge demand from the public to justify the cost. • **Legal and contractual limitations:** A dataset may be subject to legal or contractual agreements that prevent it from being released The British Columbia Open Data Open Information Policy has a set of standards that must be followed before releasing this data set to the public. The key topics include Privacy, Copyright, Legal, Security, Financial and Sources. Here are the key topics in detail: **Privacy** • Is the Data free of Personal Information that may directly identify an individual (e.g., name, phone number, photo, address, driver's license number or any similar identification number)? • Is the Data free of information that may indirectly identify an individual (e.g., through the use of data based on small numbers, limited geographic distribution or that could reasonably be combined with other data to identify individuals)? **Copyright**

- Have you contacted the Intellectual Property Program?
- Is the material created solely by B.C. government employees?
- Do the materials include only content owned by the B.C. Government (i.e., have you ensured that there is no third-party content included in the materials)?
- Have you ensured that there is no exclusive license for another party to use or access the materials?

Legal, Contractual or Policy Constraints

- Is the public release and use of the Data permitted under law, contract or policy? (e.g., have you ensured that there are no relevant legal, contractual or policy restrictions or limitations)
- If there are legal, contractual or policy restrictions or limitations to the public release or use of the Data, have they been addressed?

Security Controls

- Have you contacted your ministry information security officer (MISO) to ensure that all necessary security controls have been implemented?
- Has the material been labelled as 'Public' using the Information Security Classification Framework?

Pricing Frameworks

- Is the Data available to the public without collecting a fee?
- If a fee is required, does the program area have the authority to waive any fees associated with the release of the Data?

Data Source

- Does your ministry have primary responsibility for the Data (i.e., assigned Data Custodian)?
- Is the Data complete (i.e., a subset of the Data has not been excluded)?

Can the Data be provided in a machine-processable format (e.g., CSV)? Refer to the Open Data Physical Format Standard.

Exclusion Rules	RPD only shares information about locations owned and leased by RPD. FOIPPA exclusion categories are: ➢ section 15 - disclosure harmful to law enforcement ➢ section 19 - disclosure harmful to individual or public safety RPD has four categories of locations to be excluded from the open data set: 1. Stand-alone shelters 2. Personal residences 3. Stand-alone locations whose identification poses a security risk, e.g. RCMP – Combined Forces Special Enforcement Unit, Correctional Centers, Courthouses and Juvenile Centers. 4. Locations where a Customer occupies 100% of the government of British Columbia presence in the building and whose identification poses a security risk
Policy	Check out the Open Information and Open Data Policy

Planning	
Open data in RPD	Open Real estate data can be useful to contractors, city planners and the construction industry for accessing open land use information and permits. At RPD we currently release open data information about our owned and leased properties predominantly for occupancy by ministries. We follow FOIPPA (Freedom of information and Protection of privacy act) exclusion categories. The specific information we release is the: - Town and Address - Area (m2/ha) - Tenure (owned/leased) - Latitude and Longitude - Energy Data
Open data Risk Assessment	Use the Open Data Risk Checklist as a risk assessment to check if your data follows BC's Standards on Privacy, Copyright, Legal, Security and Financial aspects.

Creating open data set	**Data Publication Channels** The DataBC Program makes data available through a combination of several different channels: • BC Geographic Warehouse • BC Data Catalogue • iMapBC • BC Map Services (WMS and WFS) • BC Map Hub • Data Distribution Services (coming soon) Refer to the Data Publication Channel section on the DataBC Publication website. **Financial Obligations** DataBC operates on a cost-recovery basis, so there may be a charge to your branch for making your data available through the DataBC program. This one-time charge covers the initial loading of the dataset and ongoing maintenance and refreshing of the data set. **Here are some guidelines:** • Depending on DataBC resources, datasets that are considered foundational might be loaded at no charge. • Data to be made available only to The BC Data Catalogue will be loaded at no charge. If there is a charge it will generally be between $1500 and $7000, depending on: • The number of datasets. • The complexity of the datasets. • The security requirements. • The access channels to be used. In certain circumstances there may be additional charges for the following: • The dataset is extremely large. • The load requires extensive manipulation and transformation of the input data. • DataBC is heavily involved in operational planning.

- The data source is nonstandard.

The amount of the charge will be discussed at the *Discovery Whiteboard*, held at the beginning of the publication process.

When creating and releasing an open data set please consider the following:

- The data should be standardized and exhaustive.
- Include data contextualization, data inclusiveness, data interoperability, and data marketability.
- Ensure the quality of data is at its highest.
- Make sure the data and data set are complete.

Data Publication Request

To request a data publication using DataBC's services, complete and submit the *Before You Start* form.

Next Steps

Once you have submitted the Before You Start form to DataBC, you will receive a response from one of our team members outlining next steps.

Please review DataBC Standards and Guidelines for File-Based Contents, Metadata and Roles and Responsibilities:

- **File-Based Content**: identifies the file formats which must be used when publishing Open Datasets and provides guidelines for specific physical file formats. It provides examples for:

- Comma Separated Variable (CSV)
- Delimiter Separated Values (DSV)
- Extensible Markup Language (XML)

- **Metadata Standards**: describes recommended metadata standards and provides a high-level summary of metadata requirements for data objects when publishing data to the BC Data Catalogue.
    - Metadata is data which describes some of the aspects of data.
    - Some benefits of metadata: It provides a business context and helps bring an understanding to the data, facilitates data re-use and sharing, defines data structure, and facilitates data design discussions.

- **Roles and Responsibilities**: describes why the roles and responsibilities of the Data Custodians, Managers and Stewards are important and the obligations of each of these.

Data Owner (Assistant Deputy Minister)

Approve exclusion criteria for open data

Data Custodian (Executive Director)

As a Data Custodian your responsibilities are managing the data as a valuable business asset through its entire lifecycle. Share approved exclusion criteria with Data Stewards and where possible, making data accessible to the public (approver of RPD Branch open data)

Data Steward (Manager/SME)

As a Data Steward your responsibilities are managing the data/metadata storage, quality assurance, update open data set as per approved exclusion criteria and use the open data toolkit to assess what data is eligible as open data.

Data Manager (Data Governance Team)

As a Data Manager your responsibilities are to provide guidance and tools for identification of open data (open data toolkit, links to relevant policies and other information)

Supporting DataBC guidance

DataBC steps on creating a dataset and metadata set for the BC Data catalogue.

DataBC steps and restrictions on creating a dataset and metadata for the B.C. Geographic Warehouse (BCGW)

DataBC Data Distribution rules and regulations.

DataBC Location Services.

DataBC Web-Based Mapping.

DataBC Common Data Standards and Guidelines.

Publishing	
Process to release	• Use Toolkit to understand Open Data Policy and Data sets. • Notify the Data Governance team when updating the criteria list. • ADM approve exclusion criteria for the data (if the criteria has changed). • Share approved exclusion criteria to stakeholders. • Complete documentation. • Create an E-approval with all documentation for ED approval. • Notify the Data Governance team when creating E-approval. • Approval from owner and impacted Executive Directors. • Update division about release (relevant staff). • Notify relevant stakeholders. • Notify the Service Provider (CBRE). • Submit forms and data to DataBC. • Publish Open data set and risk assessment checklist and form to the DataBC Catalogue. **Publishing Workflow**
Approval	Use the E- Approval system to approve Criteria lists and data sets.

Resources
Open Information and Open Data Policy (can download pdf) • https://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/services-policies-for-government/information-management-technology/information-privacy/resources/policies-guidelines/open-information-open-data-policy.pdf
British Columbia- Open Government Licence • https://www2.gov.bc.ca/gov/content/data/open-data/open-government-licence-bc
API Terms of Use for Information https://www2.gov.bc.ca/gov/content/data/open-data/api-terms-of-use-for-ogl-information
Open Data Physical Dataset Format Standard

• https://www2.gov.bc.ca/assets/gov/government/services-for-government-and-broader-public-sector/information-technology-services/standards-files/open_data_physical_dataset_extract.pdf
Actual DataBC Assessment and Checklist • *Open Data Assessment and Checklist - Blank (DOCX, 30 KB)*
Before You Start Form • Before You Start
• DataBC Office General mailbox: data@gov.bc.ca Director: Alexander.Ritchie@gov.bc.ca
• Privacy, Compliance and Training Branch Email: Privacy.Helpline@gov.bc.ca Ph. (250) 356-1851 Website: https://www2.gov.bc.ca/gov/content/home/privacy
• Intellectual Property Program Email: QPIPPCopyright@gov.bc.ca Ph. (250) 216-8935 Website: https://www2.gov.bc.ca/gov/content/governments/services-for-government/policies-procedures/intellectual-property/intellectual-property-program/intellectual-property-disposals
• Legal Services Branch List of ministries client service coordinators http://gww.legalservices.gov.bc.ca/clientassistance/clientservicecoordinators.aspx Website: https://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/legal-support-guidance
• Ministries Information Security Officers https://www2.gov.bc.ca/gov/content/governments/services-for-government/policies-procedures/information-security-policy/role-of-miso
• Open Data Physical Dataset Format Standard http://www2.gov.bc.ca/assets/gov/government/services-for-government-and-broader-public-sector/information-technology-services/standards-files/open_data_physical_dataset_extract.pdf

• Information Security Classification Framework https://www2.gov.bc.ca/gov/content/governments/services-for-government/information-management-technology/information-security/defensible-security/security-embedding-dna-controls/information-security-classification

Glossary	
Term	Definition
Anonymization	A de-identification process that removes or transforms all direct and indirect identifiers in a record for which there is a reasonable expectation that the identifiers could be used, either alone or with other information, to identify an individual.
Data	The smallest meaningful units of recorded information generated by an organization, which gain significance when stored in a structured manner that enables them to be synthesized and interpreted.
Data Classification	The process of organizing data by relevant categories so that it may be used and protected more efficiently to make data easier to locate, retrieve and protect.
Data Transformation	Data transformation is the process of changing the format, structure, or values of data.
De-identification	A process that removes, or transforms, direct and indirect identifiers in a record using methods that can include generalization, suppression, aggregation, and randomization, and for unstructured data can include redacting or severing, with deidentification processes resulting in partial de-identification or anonymization.
Direct Identifier	Information that directly identifies an individual (e.g., name, address, social security number or other identifying number or code, telephone number, email address, etc.)
Disposition	The process which enables government to dispose of records which no longer have operational value, either by permitting their destruction, by requiring their transfer to the government

	archives, or by agreeing to their alienation from control of government.
Freedom of Information (FOI)	The right to access information, by the public, held by public bodies.
Harm	Damaging consequences resulting from information incidents, which can originate from malicious to accidental.
Indirect Identifier	The ability to identify specific individuals in conjunction with other data elements, i.e., indirect identification (these data elements may include a combination of gender, race, birth date, geographic indicator, and other descriptors) indirect identifiers being considered personal information if they can be combined together to identify an individual.
Information	Any collection of data that is processed, analyzed, interpreted, classified, recorded, or communicated to serve a useful purpose, present fact, or represent knowledge in any medium or form. Information includes both data and records.
Information Incident	Is a single or a series of unwanted or unexpected events that threaten privacy or information security.
Information Management Security Classification	A standard describing four levels of security classification to be applied to government information based on the degree of harm that could reasonably be expected to result from unauthorized disclosure.
Information Schedule	Approved under the Information Management Act, an information schedule provides a timetable that governs the lifecycle of government information. Information schedules specify how records are managed to ensure that government information is kept for as long as required and authorize the holding, transfer, and disposal of records/data.
Integrity	The characteristic of information being accurate and complete and the preservation of accuracy and completeness by protecting the information from unauthorized, unanticipated, or unintentional modification.

Master Data	A subset of Reference Data which is platform agnostic data and is extracted, transformed, and loaded into master data sets for purpose of conducting business, improving accuracy, consistency, accountability, and stewardship.
Open Data	Data that has undergone an Open Data Assessment, meets the requirements included in this Policy, and is listed in the Open Data Catalogue.
Personal Information	Means recorded information about an identifiable individual other than Contact Information.
Reference Data	All data within the RPD portfolio including platforms, adhoc, reports, analysis, and metadata that is generated and maintained to support business processes.
Retention	The rules and activities aimed at prolonging the existence of information by maintaining it in a condition suitable for use, either in its original format or in a more persistent format, while leaving intact the information's intellectual form.
Source Data	Source Data may be a database, a flat file, live measurements from physical devices, scraped web data, or any of the myriad static and streaming data services which abound across the internet.
Structured Data	Data that has been divided into standardized pieces that are clearly defined, searchable and quantitative. Structured data is often stored in data warehouses and exists in predefined formats.

Open Information Re-Crawl and Index new, deleted or updated documents

Occasionally Open Info will make a urgent request to update their index. Likely such a request is to remove a search result of for a record that has been published but not correctly redacted.

Confirm the record has been deleted from the Open Info web server and the link has been removed from the masterlist s. 17
Likely the record will be at the bottom of the masterlist page. Request from the Open Info contact the record ID and an example of a search returning the record in the results. Search the Open Information Catalogue

In the Mindbreeze producer appliance s. 15 make a modification change to the Open Info index that will have no effect on the indexed content s. 15 .

You can check or uncheck Enable Default ACLs for example, since it has no real effect in most cases.
Then the Save button is going to be displayed and you can perform Apply changes and restart on save.

The crawler should re-crawl and index Open Information records. You can verify this in the telemetry. s. 15

s. 15

Since the 2018 Sprint Release, such a configuration change restarts only the connector involved, nothing else.

There are two other methods you can use if SSH command line is available.

You can identify the crawler process and stop it then the mesnode core process starts it again:

s. 15

You can run this command to pretend a configuration change from the command line:

s. 15

Sync the index from the producer to the consumer s. 17

Verify the record has been deleted from the index and no results are returned for the record. Search the Open Information Catalogue

Routine Release

Wednesday, July 18, 2018 1:40 PM

Background

- All public bodies are required to establish an Routine Release (RR) list as per [s71 of FOIPPA]

- Routine Release comes through FOI because the MSD employee who sent the client to FOI does not know what they can RR or because the ministry client doesn't know they can call 1866 and get this information themselves

- We recognize that in some instances applicants are getting turned in circles but it is essential that FOI is not used to fix a lack of training within district offices and IAO needs a consistent practice

- MSD has the authority to determine what is RR not IAO, read the **Access to Personal Information by a Clien**t tab on the MSD [website] for more information

- As of March 2020, MSD has informed IAO they are working on expanding their RR list and know to keep us in the loop so the FOI process is consistent with theirs

- If the applicant is an inmate, we cannot follow this process because we have to assume that personal records that would normally be full disclosure could still require severing for the safety of the applicant if they are incarcerated because we have to assume they won't be able to keep the records from landing in other inmates' hands

- March 2021 update: see below for release options for T5007 of deceased clients (not a true routine release but it's an option and easier than FOI)

Procedure

- Consolidated Intake will open the shell of the file and assign it to the group queue

- Team Intake will determine if it is RR. This is what is approved for RR:
  - **a copy of a record that was submitted by the client to the ministry, for example, a doctor's letter, a pay stub, a Monthly Report (HR0081) form (AKA check stubs for IA and Disability)**
  - **a copy of a record that was previously provided by the ministry to the client, for example, a letter from an Employment and Assistance Worker**
  - **calculation of assistance in a tax year (T5007 information) - ie: applicant requesting income assistance payments, records, and statement.**

- Here are additional examples of RR:
  - When the applicant asks for "all addresses on my file since XXXX"
    - the DO can RR their Intent to Rent and/or Tenancy Agreement as they are forms the client submits to the DO
  - From an individual requesting just their PWD application and approval documents

? • If you are unsure if the request is RR, ask another FOI Analyst, Team Lead or Manager. **ONLY contact via Skype Kerry Ast or email at SDSI.OPS.Support.RecordsManagement@gov.bc.ca if it is going sideways**.

- There are cases where a third party puts in a RR and if there is a consent on their MSD file, MSD will advise us in the response to the CFR and we can send the RR letter.
  - But there are times where the third party does not have consent on their MSD file so we have to do an FOI.
  - The consent must be on the MSD file, a consent supplied to IAO is not sufficient just yet and will have to go through FOI
  - Consent for us is not the same and so it has to go through FOI.

- If the applicant states they have been pushed to FOI from MSD then use the email template '**P - Routine release notification**' in AXIS so MSD can use it as a training opportunity

- If it is an RR
  - Finish updating AXIS with the relevant information (enter request description, subject code, etc.)
  - Send the MSD 'P - Response - Routine Release' letter
  - Close the file with Final Action - Routine Release

- If it is not RR, then process this as an FOI

Please Note

- FOIs for 'PWD application and supporting documentation' submitted by a third party have to go through the FOI process
  - If they provide the right authorization form to act on behalf of the client
    - Process as normal
  - If they don't provide the right authorization form to act on behalf of the client
    - Get the right authorization from the advocate and process as normal

T5007s of deceased Ministry clients can be released by Ministry to appropriate individuals instead of via FOI

- Usually MSD requests for records of the deceased are just for the T5007 so the Executor can file the last year of taxes and settle the estate.
- T5 will be sent out to the last known address on file when they are ready and can't be created any earlier.
- If duplicate T5 needs to be issued, requestor can call the Ministry at 1-866-866-0800 & ask to have a service request started.
- Then their Finance Branch will send the duplicate T5 end of February.

T5007 information of the deceased may be obtained from the Ministry by providing one of the following:

a. Letter of Appointment or Executor Document
b. Next of Kin on Funeral Documentation

c. Power of Attorney
d. Consent on file

RE_ T5007
tax histor...

HIBC (Health Insurance BC) - MSP

June 30, 2023 2:20 PM

Health Insurance BC (HIBC – an agency of the Ministry of Health) administers the Medical Services Plan and the records you are seeking are in the custody and control of Health Insurance BC. They routinely release these types of records outside of the FOI process. You will need to submit your request to them directly. For your convenience, I have provided the contact information:

Health Insurance BC
PO Box 9035 Stn Prov Gov
Victoria, BC V8W 9E3
Toll-free: 1-800-663-7100
Lower Mainland: 604-683-7151

Forms that get sent to us by mistake, email to:
hlth.mspgroup@hibc.gov.bc.ca

Or

You may request that your drug history be sent to you by completing HLTH form 2942 –Authorization to release medical records and submitting it to the address indicated at the bottom of the form. This form may be downloaded from website:

https://www2.gov.bc.ca/gov/content/health/health-forms/msp/forms-for-bc-residents

Or

For the attached request you do not need to submit a Freedom of Information Request to Information Access Operations. You may request that your client's drug history be sent to you by completing HLTH form 2942 –Authorization to release medical records and submitting it to the address indicated at the bottom of the form. This form may be downloaded from website: https://www2.gov.bc.ca/gov/content/health/health-forms/msp/forms-for-bc-residents

Routine Release process

Friday, May 12, 2017   8:58 AM

- As of May 10, 2017, Lori Halls approved the following process for FOI requests where PSA may respond by informing the applicant that the records they've requested are routinely/publicly available through channels other than FOI.

- Typical workflow:
    - IAO sends out CFR
    - During records gathering, PSA determines that the requested records are publicly/routinely available and do not need to be provided through FOI
    - PSA will send back a completed CFR stating this and including any additional wording/explanation specific to the file for example,
        - this information can be publicly accessed at [hyperlink] or
        - Current/Past BC public service employees can obtain this information by submitting a MyHR Service Request, etc.
    - PSA will also provide DM approval with this CFR for IAO to proceed with responding directly to the applicant using a standard template and the explanation provided.
        - This is similar to the process for NRR responses, except where the DM signs-off on NRR's in the NRR signature block on the CFR form, for these request approval will likely need to be transmitted by email.
    - File is closed with a Routine Release disposition

Workflow - Withdrawals and Routine Releases

September 6, 2023 7:46 AM

When the Ministry comes back and requests that you contact the applicant for a withdraw or suggests connecting the applicant with the Ministry for a Routine Release, you should not automatically pursue either unless the logic is completely plain as to why the request should not have been opened or if the material can or should be provided outside of FOI. If you are unsure, discuss with your fellow analysts, or escalate to the Team Lead.

Routine Release is IAO-speak for any response to a request that is informal or outside of the usual processes for responding to requests. This can be as simple as providing the applicant with contact information for a Ministry contact who will provide the information, to facilitating the transfer of the records to the applicant. In either case, however, responding to a file with a routine release is a Processing Team action. Instructions for Routine Release can be found at bottom of this workflow.

A **Withdrawal**, on the other hand, is an agreement by the applicant to no longer pursue a request - and where the applicant agrees that they will not be receiving any further response from the Ministry. Withdrawals should be pursued only when there is not a more appropriate or more applicable response. If their request can be better responded to with a transfer, with an NRR, a routine release, etc., please advise the Ministry of that fact. Request and processing a withdrawal is a Intake Team action.

If the Ministry asks for a withdrawal stating records are available online, confirm with the Ministry (on MOD) that this will completely respond to their FOI with the following blurb:

> ***Thank you for advising that there are publicly available records relating to this request. Can you please confirm that there are no additional records held by the ministry which would also be responsive to this FOI request?***

Once the Ministry has confirmed, process the withdrawal using the workflow below. If it is unclear or they have confirmed the records are routine release instead, process the routine release using the instructions below, assigning to the processing team.

In cases when it is **plainly obvious** that the request should be withdrawn, Intake Team analysts are free to pursue a withdrawal with the applicant right away. If you are unsure, check with the AO24 or your TL.

Processing a Withdrawal

Requests only in AXIS:

1. Log withdrawal request email from the Ministry into the CL as ***Call - Withdrawal Requested***
   a. Request should clearly outline why IAO should pursue a withdraw with the applicant.
   b. If the Intake Team Analyst is unclear about whether the request should be withdrawn, check with AO24 or your TL.
2. Contact the applicant (via email through IAOIntakeTeam@gov.bc.ca) providing the rationale for why the request should be withdrawn. Only provide information that would be appropriate to send to the applicant. Example:

   > ***The Ministry is currently gathering records and reached out to IAO to follow-up with you. The records you are seeking are publicly available here XXX. Would you like to withdraw the request?***

3. Wait for an email response.
   a. If the applicant **denies**
      i. Advise the Ministry of the applicant's response (via email). They will likely have to proceed with their CFR. Load this email into the CL once sent. Also load the email from the applicant into the CL as ***App- Withdrawal Denied***
   b. If the applicant **consents/approves**
      i. Advise the Ministry of the applicant's response (via email). We will close the request on our end and no further action is required by them. Load this email into the CL once sent. Also load the email from the applicant into the CL as ***App- Withdrawal Approved***
      ii. **Send Correspondence** - Select Letter Template: *A-Response-Confirm Request Withdrawn* –> Customize for Pending
      iii. **Delete Task Reminders**
      iv. **Request for Documents** –> Take Action -> Status -> Other (action date and completed date should be the date

the withdrawal was approved by the applicant, not the day you are processing it)
    v. **Final Actions** -> double click TBD -> select Withdrawn from the drop down menu -> Save -> Save (again)
        1) Status should read "Disposition Accepted"
    vi. **Set Publication Status in the Request Information Tab**
        1) Publication Status: Do Not Publish
        2) Set Do Not Publish Reason: Outside Scope of Publication Policy
        3) Select Save at the top or bottom of the page
    vii. **Close Request**
        1) Perform Action -> Select Close Date -> Current Action: change to Closed -> Save -> click **No** to fees -> Close Request Confirmation -> **Yes**.
    viii. **Application Fee Refund**
        1) Correspondence -> Send Correspondence ->
            a) Email Template: G - Fees - Refund Request
            b) To: Arielle.Andrews@gov.bc.ca
            c) Delete: All the purple text and "I approve as QR"
            d) Keep: Name of Payee, Request #, Amount and Mailing address. These will auto populate except for Amount, change to **$10.00**
            e) Above the pre populated information create a note with the reasoning for the refund. **"Hi Arielle, Please approve this application fee refund as the applicant withdrew the request"**
            f) Send Email

Requests In AXIS & MOD:

MOD

1. Review notification/comment in MOD from the Ministry requesting the withdrawal
    a. Request should clearly outline why IAO should pursue a withdraw with the applicant.
    b. If the Intake Team Analyst is unclear about whether the request should be withdrawn, check with AO24 or your TL
2. Reply to the comment letting the Ministry contact know you have reached out/will be reaching out.
3. No further action required on MOD, leave in CFR state until you receive a response from the applicant.

Contact the applicant (via email through IAOIntakeTeam@gov.bc.ca) providing the rationale for why the request should be withdrawn. Only provide information that would be appropriate to send to the applicant. Example:

The Ministry is currently gathering records and reached out to IAO to follow-up with you. The records you are seeking are publicly available here XXX. Would you like to withdraw the request?

MOD

4. Once the applicant has replied:
    a. If the applicant **denies** your withdrawal request, let the Ministry know via MOD comments. Ask them how they want to proceed (likely a NRR.)
    b. If the applicant **consents/approves** accepts your withdrawal request, let the Ministry know via MOD comments. No further action is required by them. Remove any watchers on the file and close on MOD as "Withdrawn".

AXIS

5. If the applicant **denies** your withdrawal request, load the email from the applicant into the CL as ***App- Withdrawal Denied***. The request will stay as "Call - CFR Sent" in as the current action and you will leave as is until you hear back from the Ministry on how they want to proceed.
6. If the applicant **consents/approves** to the withdrawal, or if an applicant contacts you to withdraw their request without being asked, load email from applicant to the CL as ***App- Withdrawal Approved***.
    a. Complete the following steps:
        i. **Send Correspondence** - Select Letter Template: *A-Response-Confirm Request Withdrawn* –> Customize for Pending
        ii. **Delete Task Reminders**
        iii. **Request for Documents** –> Take Action -> Status -> Other (action date and completed date should be the date the withdrawal was approved by the applicant, not the day you are processing it)
        iv. **Final Actions** -> double click TBD -> select Withdrawn from the drop down menu -> Save -> Save (again)
            1) Status should read "Disposition Accepted"
        v. **Set Publication Status in the Request Information Tab**

1) Publication Status: Do Not Publish
2) Set Do Not Publish Reason: Outside Scope of Publication Policy
3) Select Save at the top or bottom of the page

vi. **Close Request**

1) Perform Action -> Select Close Date -> Current Action: change to Closed -> Save -> click **No** to fees -> Close Request Confirmation -> **Yes**.

vii. **Application Fee Refund**

1) Correspondence -> Send Correspondence ->
    a) Email Template: G - Fees - Refund Request
    b) To: Arielle.Andrews@gov.bc.ca
    c) Delete: All the purple text and "I approve as QR"
    d) Keep: Name of Payee, Request #, Amount and Mailing address. These will auto populate except for Amount, change to **$10.00**
    e) Above the pre populated information create a note with the reasoning for the refund. **"Hi Arielle, Please approve this application fee refund as the applicant withdrew the request"**
    f) Send Email

Processing a Routine Release

Requests only in AXIS:

1. **Correspondence Log -** Log email request into the CL as ***Call - Routine Release***
    a. Request should clearly identify how access will be given, to allow the processing team to facilitate. This should include at minimum the contact information from the individual at the Ministry who will be providing access, or a link to where the requested information exists online, or the records which will be provided to the applicant.
    b. If the Intake Analyst is unclear about whether the request meets the standard for a Routine Release, check with AO24 or your TL.
2. **Notes** - Add in any pertinent instructions to the team regarding instructions for the routine release.
3. **Request for Documents** –> Take Action -> Status -> Routinely Releasable
4. **Delete Task reminders**
5. **Current Action** - Call - Team to Review
6. **Assign Users** - Assign to the processing team queue to finalize and complete the request.

Requests In AXIS & MOD:

MOD

1. Review notification/comment in MOD from the Ministry requesting the routine release response.
    a. Request should clearly identify how access will be given, to allow the processing team to facilitate. This should include at minimum the contact information from the individual at the Ministry who will be providing access, or a link to where the requested information exists online, or the records which will be provided to the applicant.
    b. If the Intake Analyst is unclear about whether the request meets the standard for a Routine Release, check with AO24 or your TL.
2. Reply to the comment letting the Ministry contact know you will be assigning over to the processing team to action.
3. Remove any watchers and assign over to the processing team queue.

AXIS

4. Complete all of the same steps listed above for "Only in AXIS" requests.
    a. **Correspondence Log -** Log email request into the CL as ***Call - Routine Release***
    b. **Notes** - Add in any pertinent instructions to the team regarding instructions for the routine release.
    c. **Request for Documents** –> Take Action -> Status -> Routinely Releasable
    d. **Delete Task reminders**
    e. **Current Action** - Call - Team to Review
    f. **Assign Users** - Assign to the processing team queue to finalize and complete the request.

Records that can be obtained by clients directly from MCFD Offices (routine release)

March 24, 2023 2:35 PM [Memo for MCFD Social Workers - Information Policy and Privacy Last Updated January 27, 2022]

Please see the list of records that can be provided directly to an applicant by the DO below. Once you have clarified with the applicant that the record they are seeking is one of the ones on this list, you may close the request and send a modified closing letter to the applicant.

Reportable disposition should be set to **"routinely releasable"** and current action should be set to **"closed".**

Wording you may use in the closing letter to the applicant:
Copies of [description of records from list below] is routinely available and can be obtained from the Ministry without a formal request for access under FOIPPA. Please contact your District Office to obtain these.

The District Office can refer to the Ministry Policy regarding *"Records That Can Be Obtained by Clients Directly from MCFD of DAA Offices"* and they can also reach out to the Information Policy and Disclosure Office for further guidance.

Your file with this office is now closed.

When we get an FOI request for records that should be routinely releasable and the applicant indicates that they attempted to obtain it directly and was told they need to submit an FOI request, redirect the applicant back and let them know that if they have issues they can let us know. If the applicant still gets push back on a DO providing an applicant with something that is routinely releasable, let Pearl Best know so that she can speak to the DO and reassure them that it is OK to provide what is being asked for.

Manager, Information Policy & Disclosure Office
Ministry of Children and Family Development
PO Box 9714 STN PROV GOVT
Victoria BC V8W 9S1
Telephone: 778 698-3400 Fax: 250 953-4815

The following is taken from the MCFD policy on Records That Can Be Obtained by Clients Directly from MCFD or DAA Offices.This information was sent out in a memo to all District Offices in January of 2022. The policy provides clarity on what records staff can provide directly to clients and what staff must do before releasing copies of those records. The purpose is to decrease the number of clients being directed to make Freedom of Information requests when requesting copies of their own personal information.

This direction is intended to support citizens in getting their personal information as quickly as possible while at the same time reducing the pressure on the FOI process. Staff are not expected to call in inactive records from offsite in order to provide records directly. However, staff could go into ICM to pull some records if required (e.g. closing letters). Requests for information contained in closed files stored offsite should continue to be directed to the FOI process.

Routine Releases
Did you know that some documents found in MCFD case files can be given directly to the requestor without the need for a formal request under the Freedom of Information process?

When individuals seek access to government held information, including their own personal information, that process generally falls under the Freedom of Information and Protection of Privacy Act (FOIPPA). A Freedom of Information (FOI) request is made in writing. Records are gathered, reviewed and vetted as appropriate under all applicable legislation and then released to the requestor. This process can take up to 30 business days, or in some cases much longer.

There are some documents contained within MCFD case files that can be provided directly to individuals as they do not contain third-party information (personal information of any other individual) and are not subject to any other exceptions to disclosure under FOIPPA and CFCSA.

Copies of the following records can be provided directly to a client:

- **Originals** of a Client's own identification on file (BCID, birth certificate, etc.) will be released to the parent or the youth as required (e.g. when identification is needed to apply for a driver's licence or passport). All original identification will be released to the parent or youth when the child/youth leaves care and the CS file is closed (see MCFD Returning Child in Care Identification Policy). Before releasing original identification, staff must ensure that a copy of the identification is scanned and attached to the CS Case in ICM.
- Any forms completed by the Client that they have supplied to the Ministry (example - a form the Social Worker asks a Client to complete)
- Copies of information that a client has voluntarily provided and it is clear that client supplied the item (example – letters from a character reference, Landlord, Doctor or counsellor)
- Printouts of Affordable Child Care Benefit Plans already in place; (Requestor could be the Child Care Provider or a Ministry Client receiving Benefits) – these requests can go directly to Affordable Child Care Benefits – For more information on accessing Affordable Child Care Benefits individuals can call 1 888 338-6622.
- Ministry correspondence addressed to and previously provided to the Client
- Any MCFD originating document signed by the Client and/or previously provided to the Client (e.g. Plan of Care)
- Requests for any other Records types should be directed to the FOI process (see below)

Before to releasing any copies of records directly to Clients staff must:

- Verify the identity of the Client –we still must ensure we only provide records to the RIGHT individual – Staff ***must*** verify the identity of anyone requesting records by viewing their photo identification
- Ensure that no other third party information is being released – i.e. information you are giving does not contain anyone else's personal information, including that of parents or siblings
- Never give out the only copy of a document – always provide a copy and return the original to the file(exception: provision of original identification to former children and youth in care)

For more information on submitting an FOI request, or information on the FOI process visit:
Submit a Personal Freedom of Information Request

If you have any questions please email: MCFDOCMT@Victoria1.gov.bc.ca

Routinely releasable records - (CFD & MSD files)

September 9, 2021 1:27 PM

I am pleased to inform you that a copy of the record you are seeking can be obtained directly with the **[INSERT MINISTRY]** without needing to come through the FOI process. Please see the attached information sheet.

Examples:
- dates of when they were in and out of care

Routinely Releasable Records - Records that can be obtained by clients directly from MCFD and DAA Offices

Weinrich, Jonelle MTIC:EX

From: Alexander, Janice E MTIC:EX
Sent: Tuesday, October 27, 2015 10:01 AM
To: Schulte, Leanne A MTIC:EX
Subject: routine releases for MSD

Excerpts from my routine release response letters in case helpful to you…

copies of SD81 Monthly Income Reports (AKA stubs) you provided to the Ministry of Social Development and Social Innovation are routinely releaseable to you by the District Office at which you currently receive service.

copies of identification documents you provided to the Ministry of Social Development and Social Innovation are routinely releaseable to you by the District Office at which you currently receive service.

clients wanting only a calculation of benefits or what is also referred to as the T5007, can obtain them directly from the Ministry.

• Clients requesting the current year can call the general line at 1-866-866-0800
• Clients requesting previous and/or current years can call the T5007 line at 1-877-815-2363.

Policy: Access to Personal Information By a Client - March 29, 2011

http://www.gov.bc.ca/meia/online_resource/program_administration/foipp/policy.html#5nd

Release of Information by the Employment and Assistance Office or Health Assistance Branch

Once a client's identity is clearly established, his or her *personal information* can be released to the client by the Employment and Assistance Office (EAO) or Health Assistance Branch (HAB) only if the request is for any of the following:

- a copy of a *record* that was submitted by the client to the ministry, for example, a doctor's letter, **a pay stub**, a Monthly Report (HR0081) form
- a copy of a record that was previously provided by the ministry to the client, for example, a letter from an Employment and Assistance Worker
- calculation of assistance in a tax year (T5007 information)

Janice

Janice Alexander | Intake Analyst, Personals Access Services **|** Information Access Operations **|** Shared Services BC
Phone: 250.356.2583 **|** ***Fax:*** 250.387.9843 **|** ***e:*** **Janice.Alexander@gov.bc.ca** **|** ***m:*** PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

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    00132489 112-0295
    - **John Jordan**
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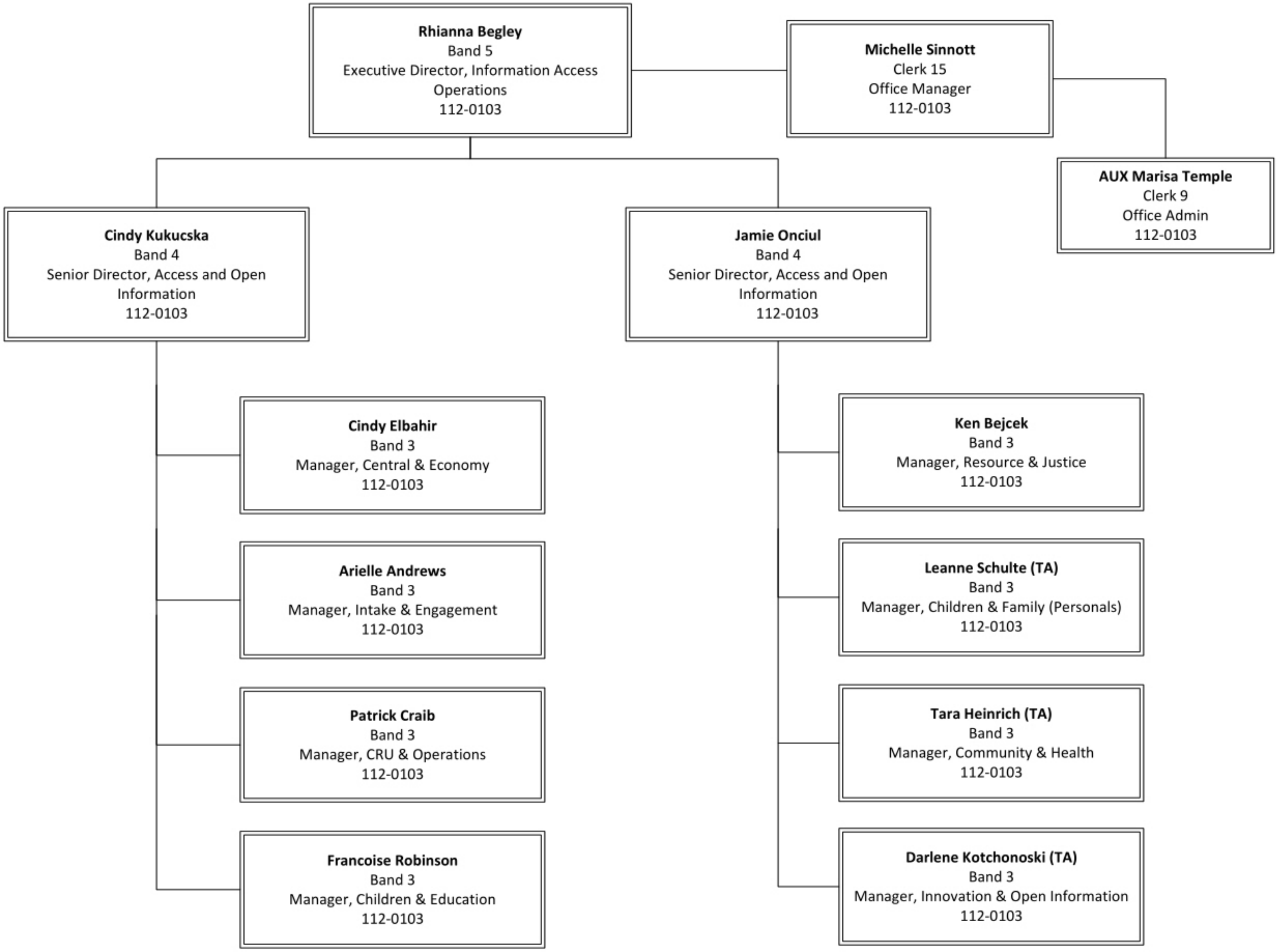
      Executive Director
      Digital Identity
      00119478 112-0295
      - **Kevin Conn (TA)**
        Band 5
        Executive Director
        00119478 112-0295



Corporate Information and Records Management Office – Information Access Operations October 2023

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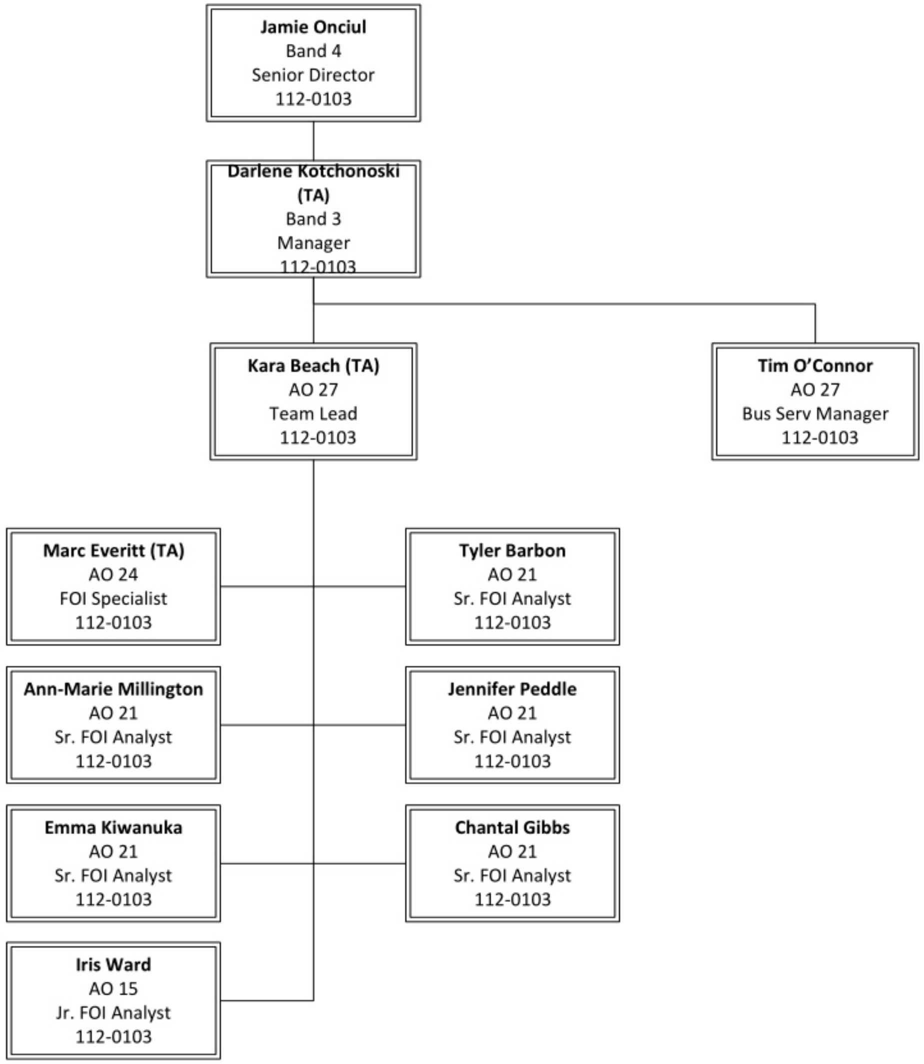
Corporate Information and Records Management Office – Information Access Operations — October 2023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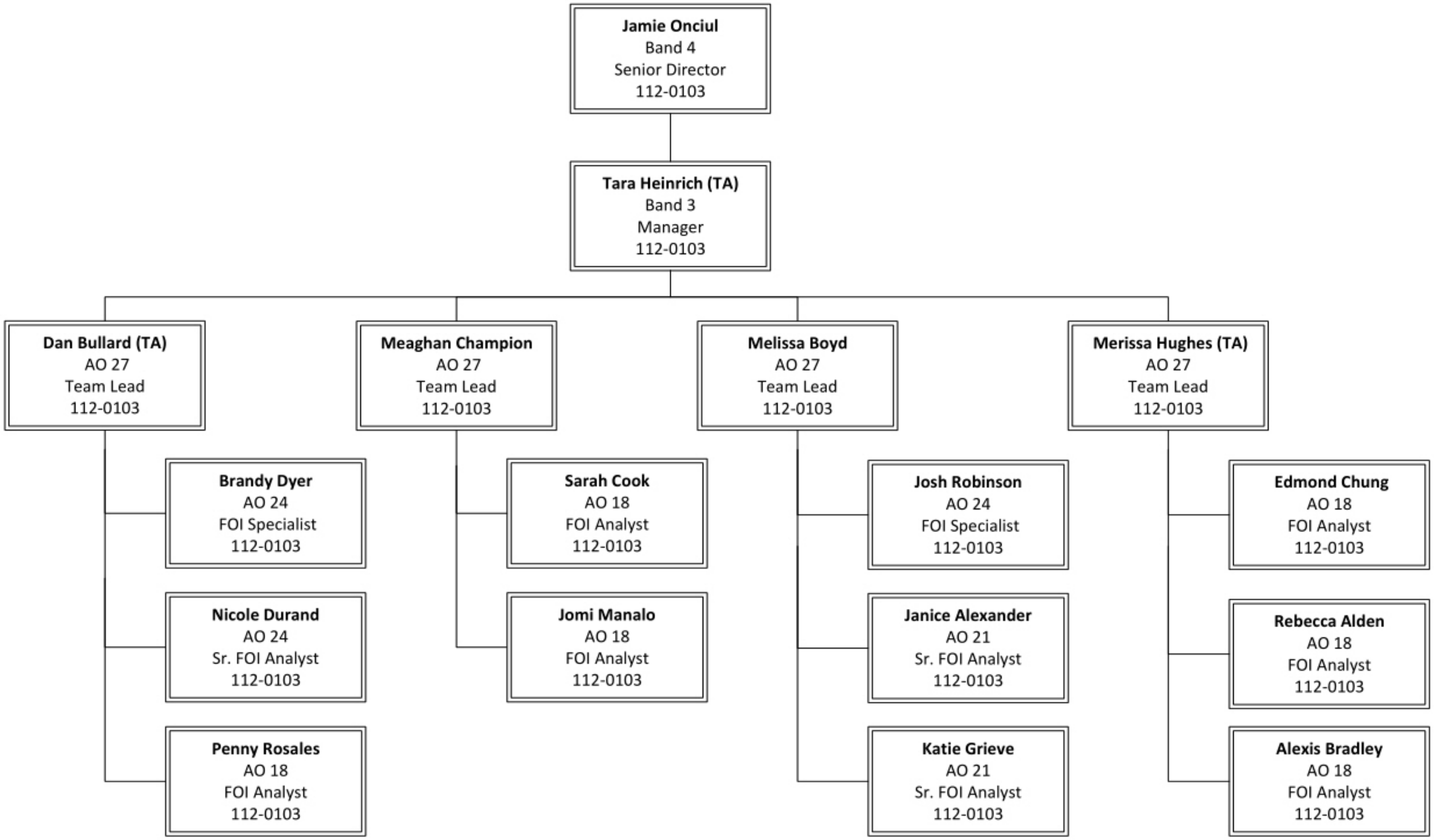
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      - **Alphonso Davis**, AO 21, Sr. FOI Analyst, 112-0103
      - **Munawar Mohammed**, AO 21, Sr. FOI Analyst, 112-0103
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      - **Kathleen Anderson (TA)**, AO 24, FOI Specialist, 112-0103
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      - **AUX Terri Clark**, AO 21, Sr. FOI Analyst, 112-0103
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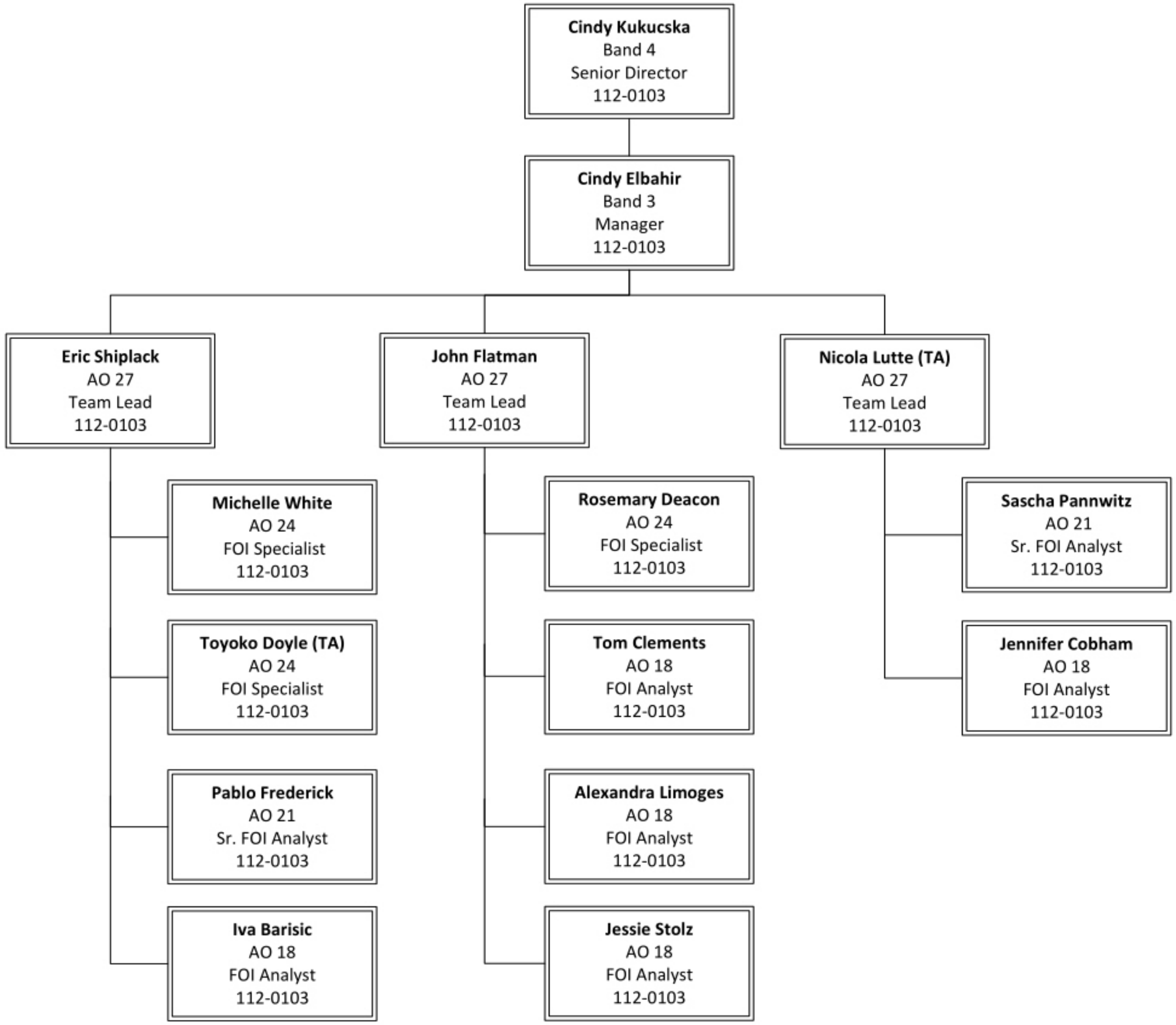
      - **Evan Swift (TA)**, AO 24, FOI Specialist, 112-0103
      - **Cameron Wulff**, AO 21, Sr. FOI Analyst, 112-0103
      - **Mark Redgwell**, AO 21, Sr. FOI Analyst, 112-0103
      - **Bryan Beck**, AO 21, Sr. FOI Analyst, 112-0103
      - **Melissa Kerr**, AO 18, FOI Analyst, 112-0103
      - **Nataliya Zaporozhets**, AO 18, FOI Analyst, 112-0103
      - **Ryan Bal**, AO 18, FOI Analyst, 112-0103

Corporate Information and Records Management Office – Information Access Operations October 2023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Senior Director
112-0103
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Eric Shiplack
AO 27
Team Lead
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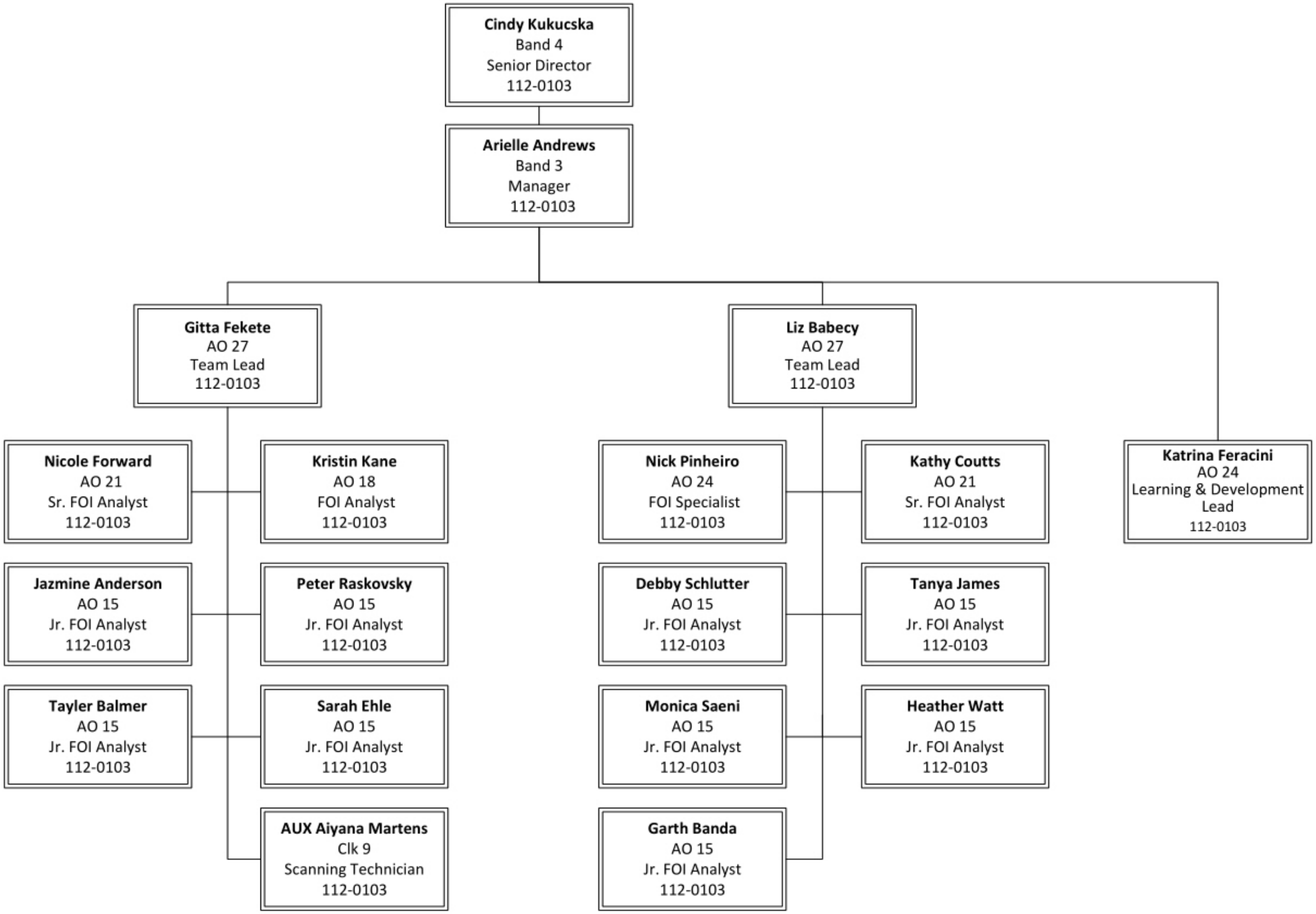

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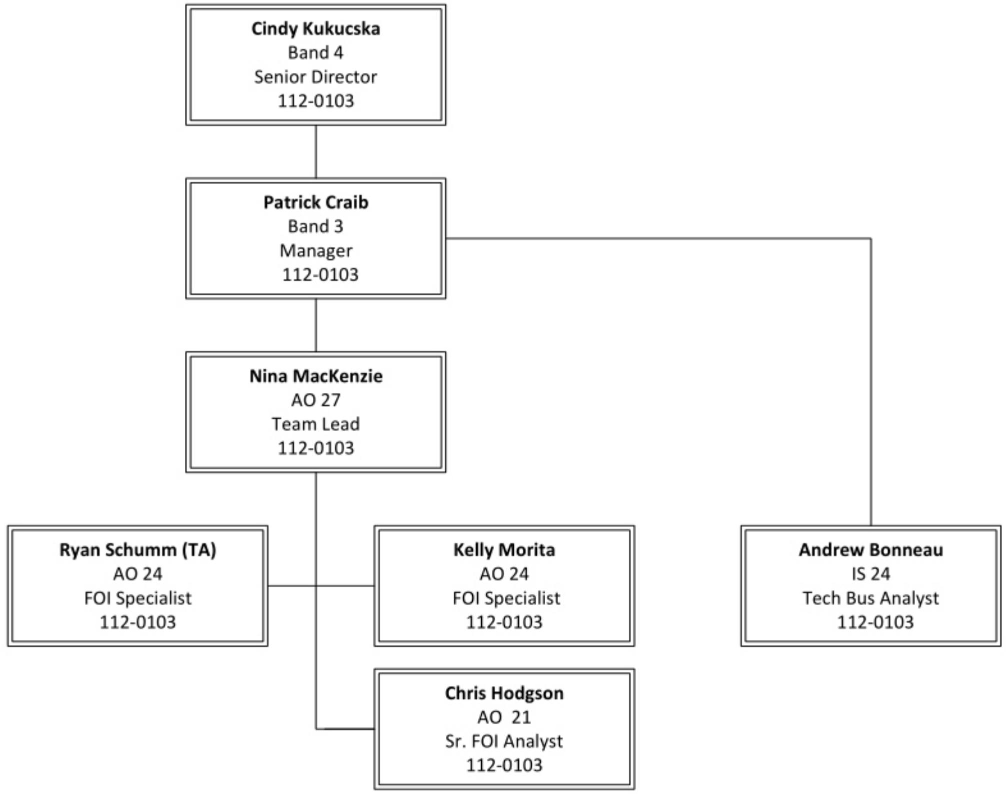
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Chris Hodgson
AO 21
Sr. FOI Analyst
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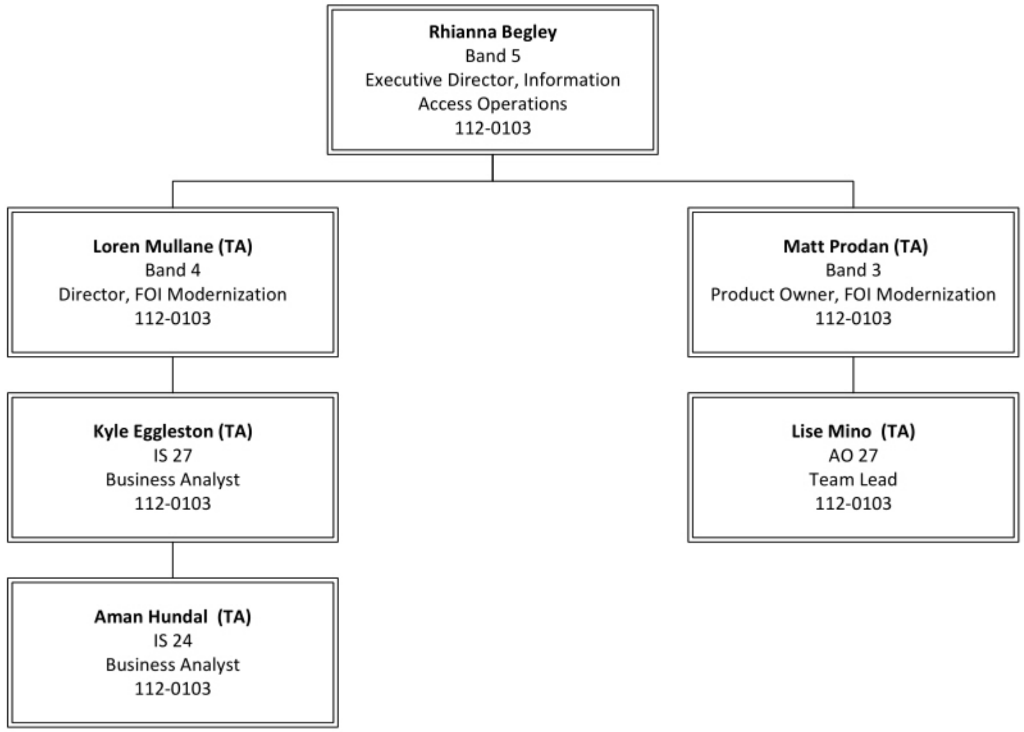
Rhianna Begley
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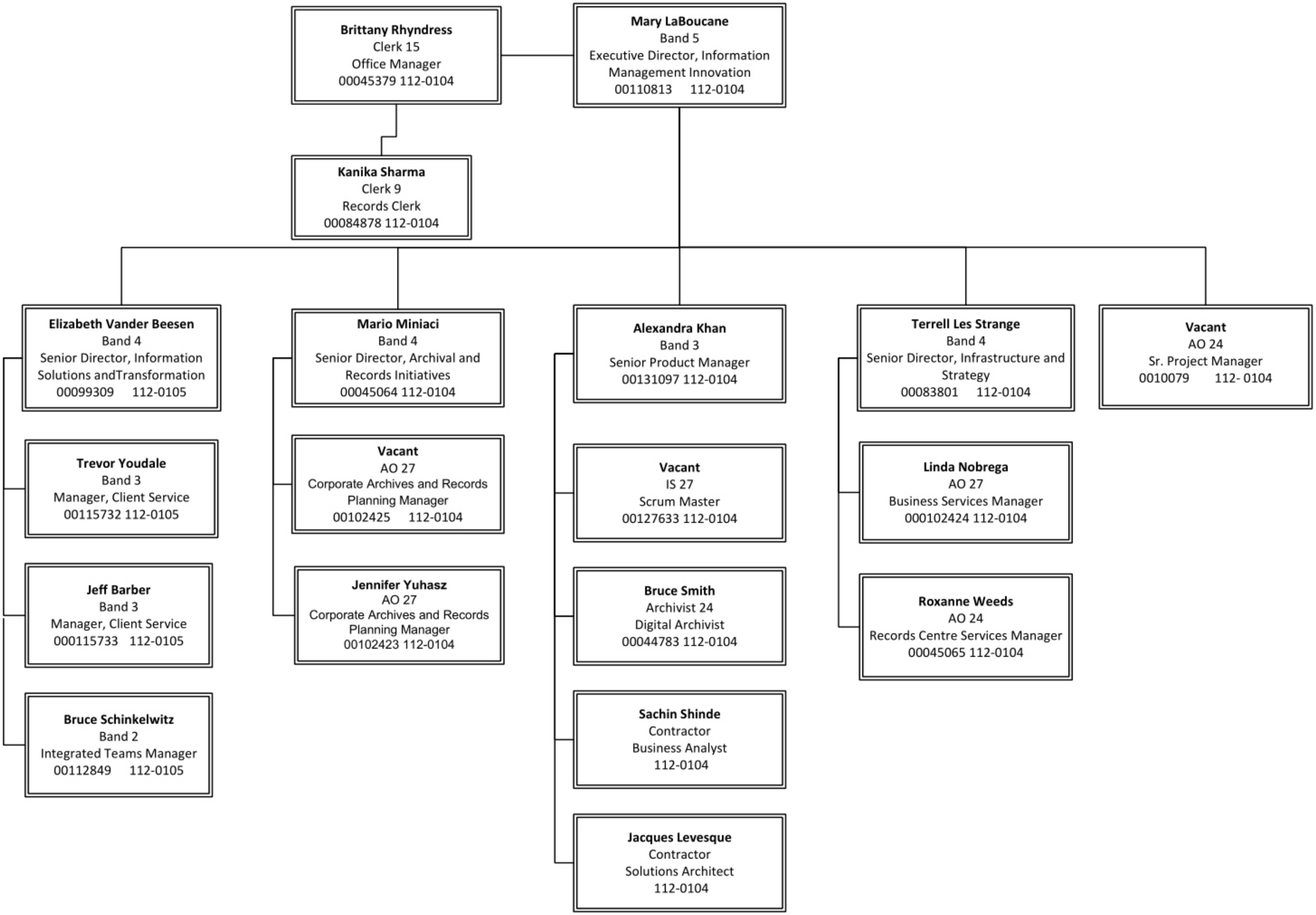

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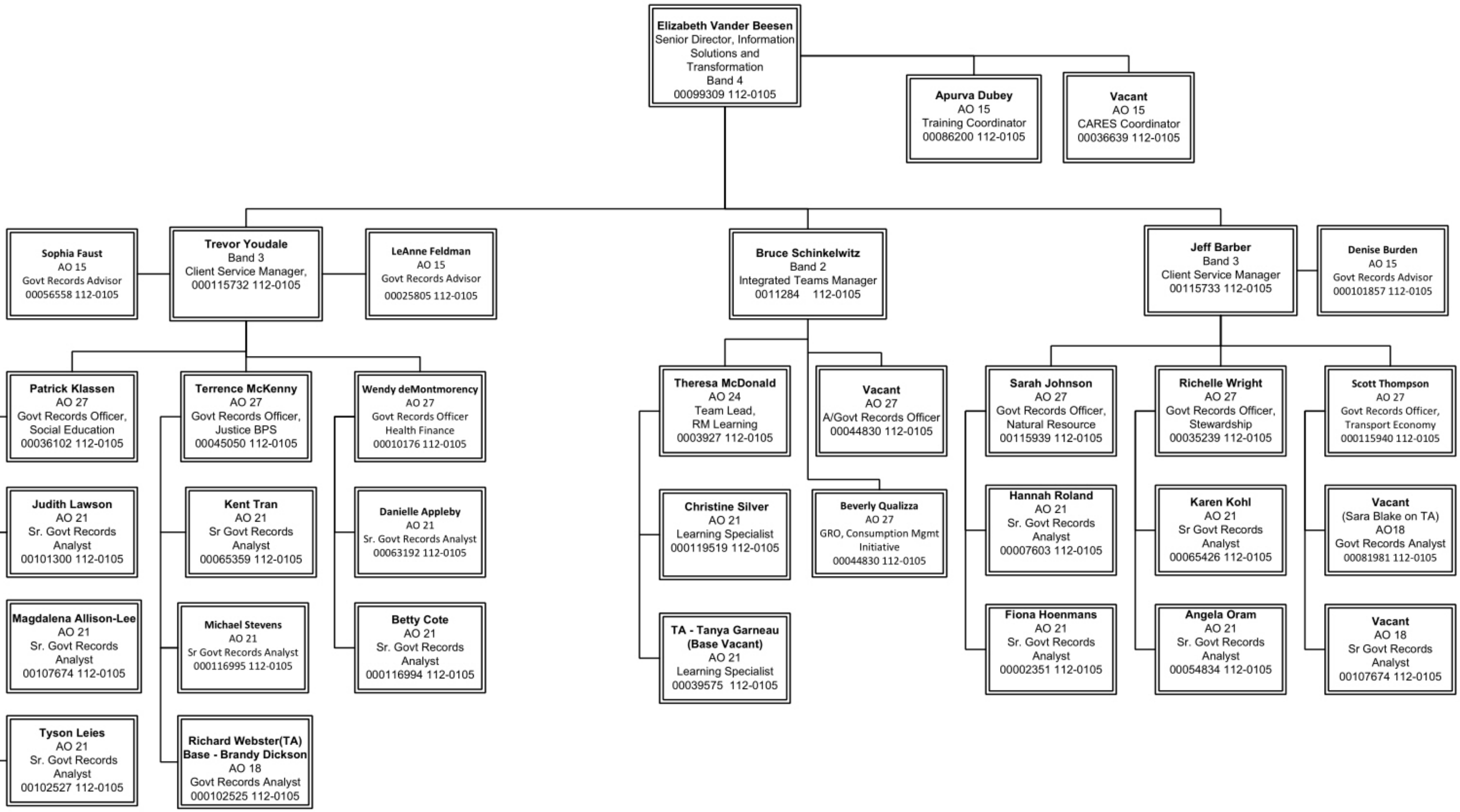

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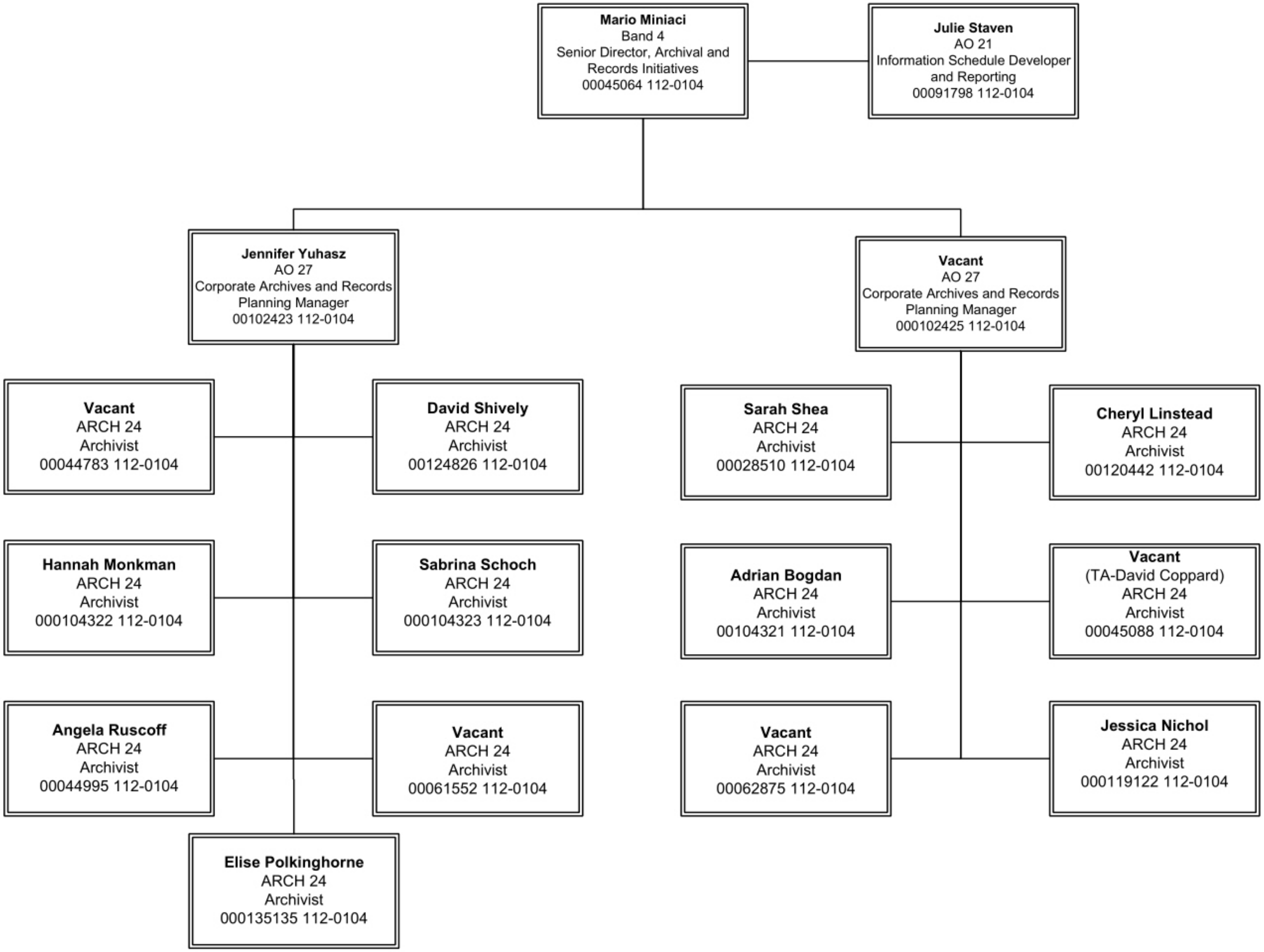
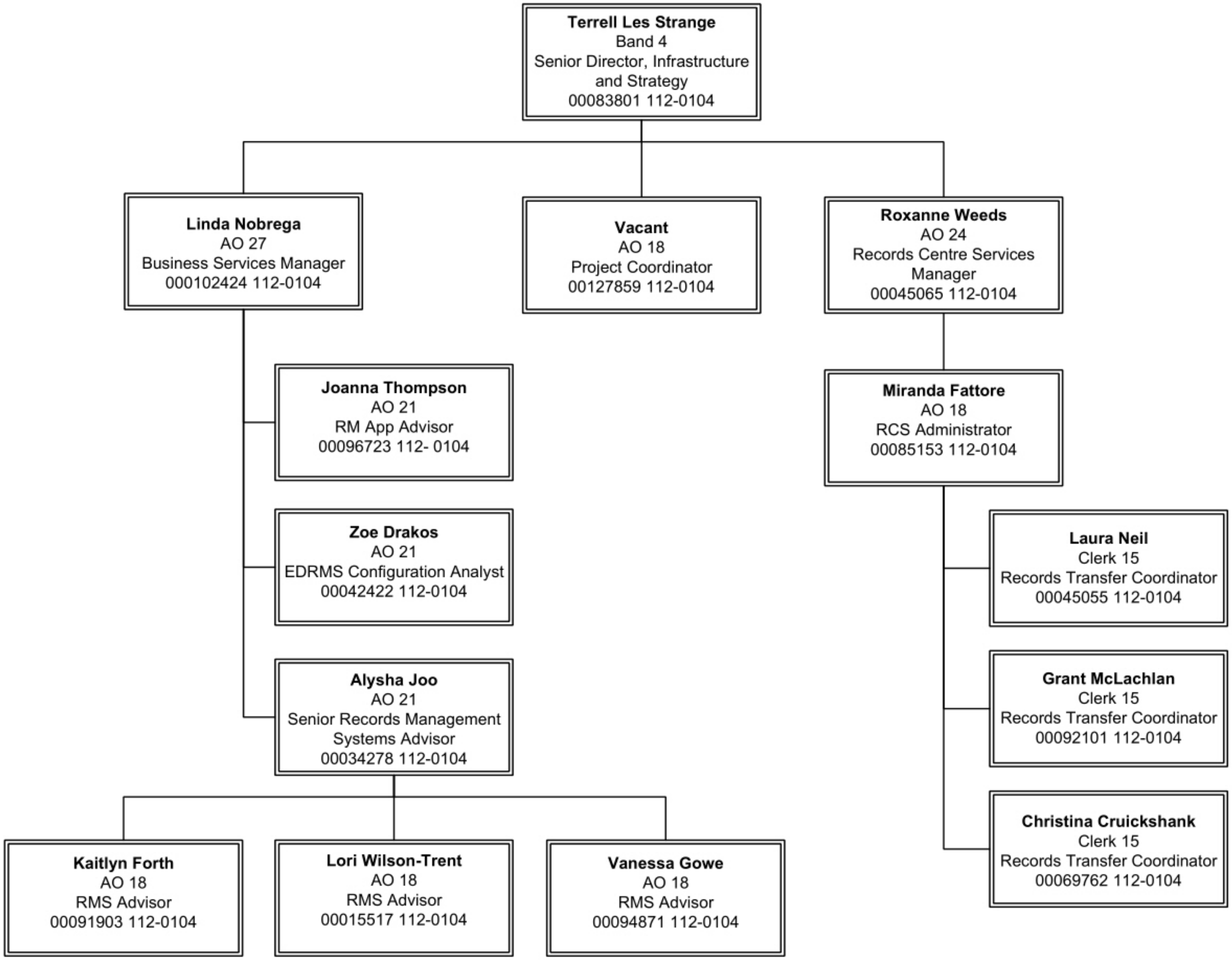


Corporate Information and Records Management Office – Government Records Services October 2023


Terrell Les Strange
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00096723 112- 0104
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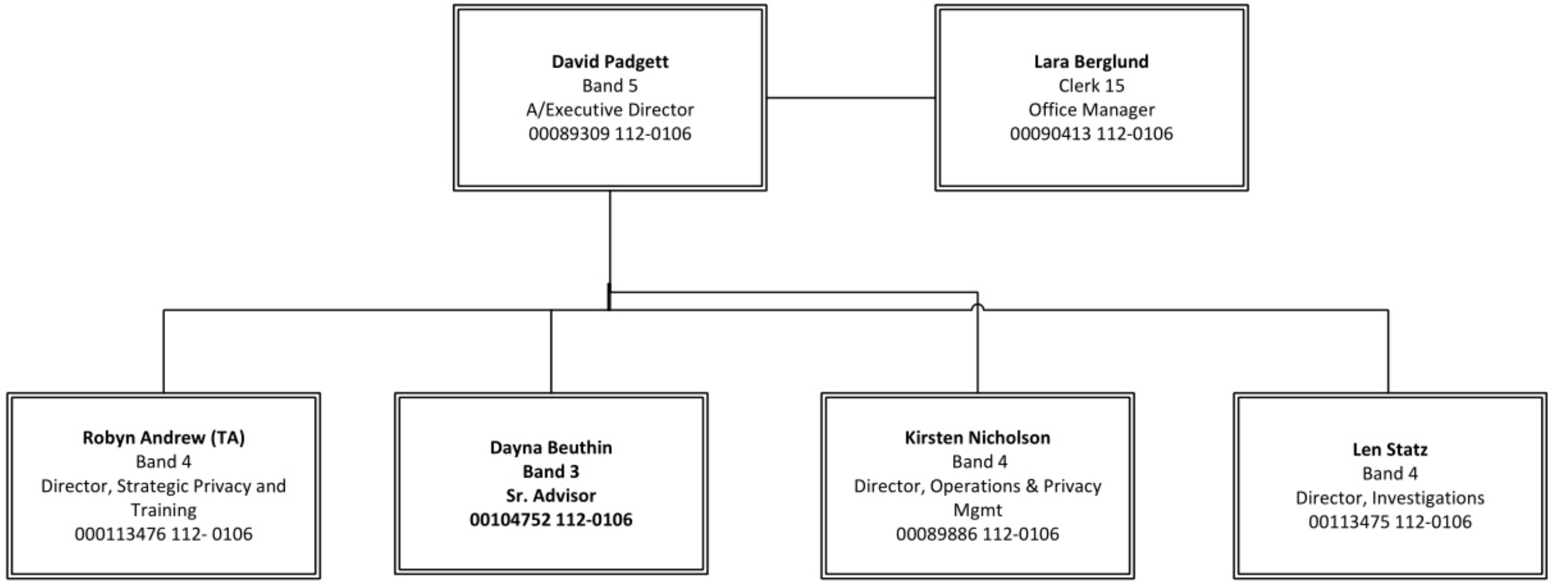
David Padgett
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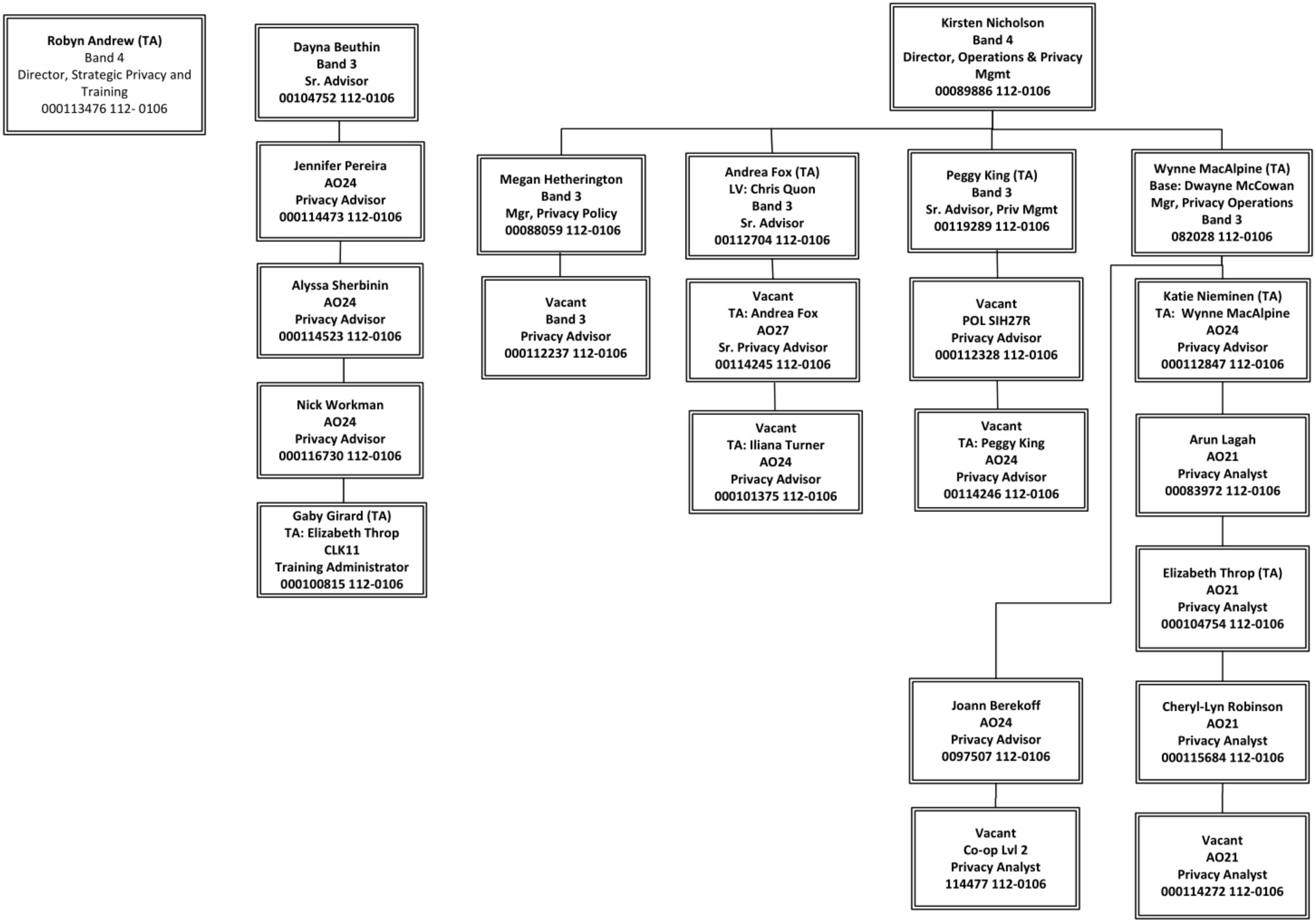
Robyn Andrew (TA) Band 4 Director, Strategic Privacy and Training 000113476 112- 0106
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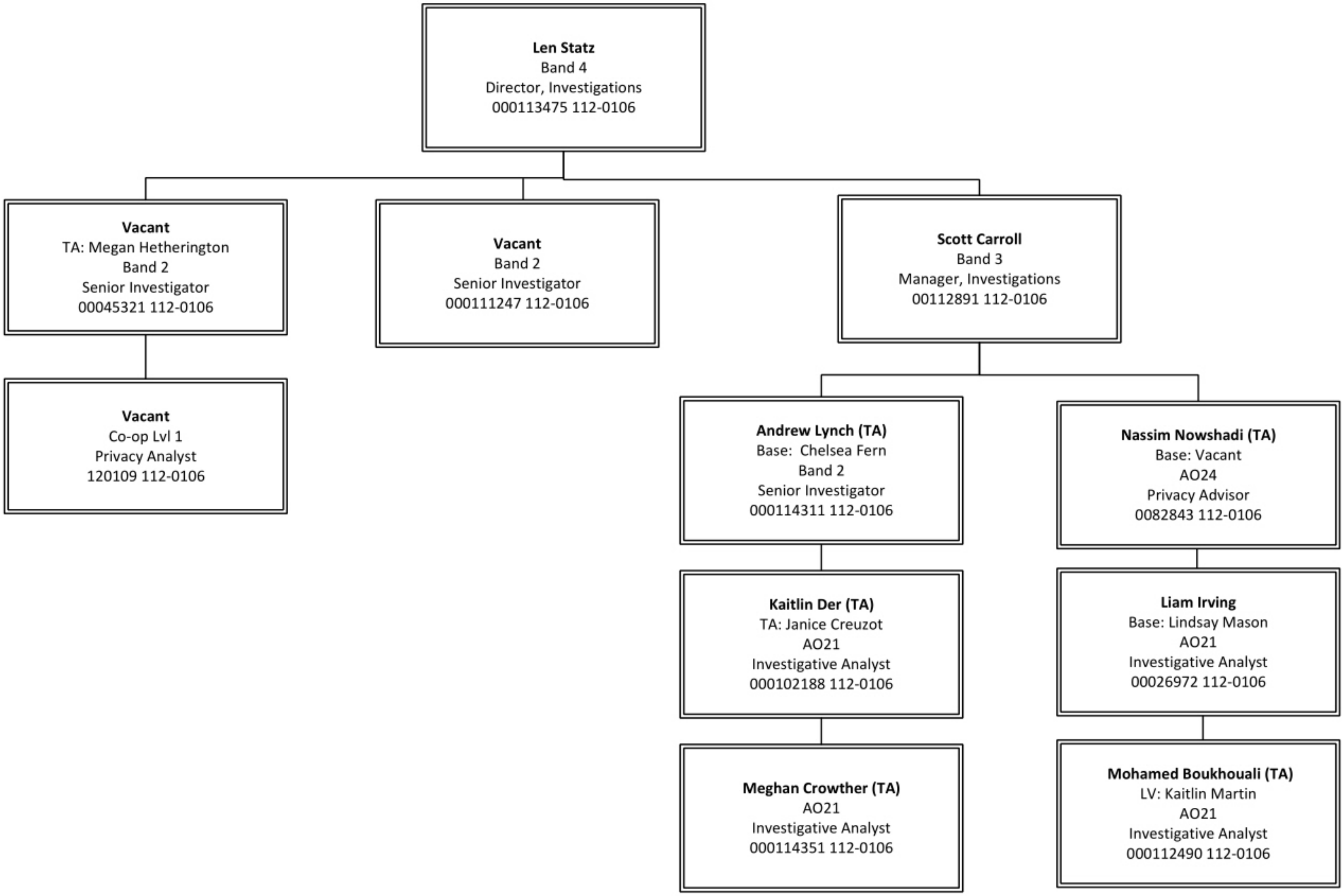
Vacant AO21 Privacy Analyst 000114272 112-0106


Len Statz
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LV: Kaitlin Martin
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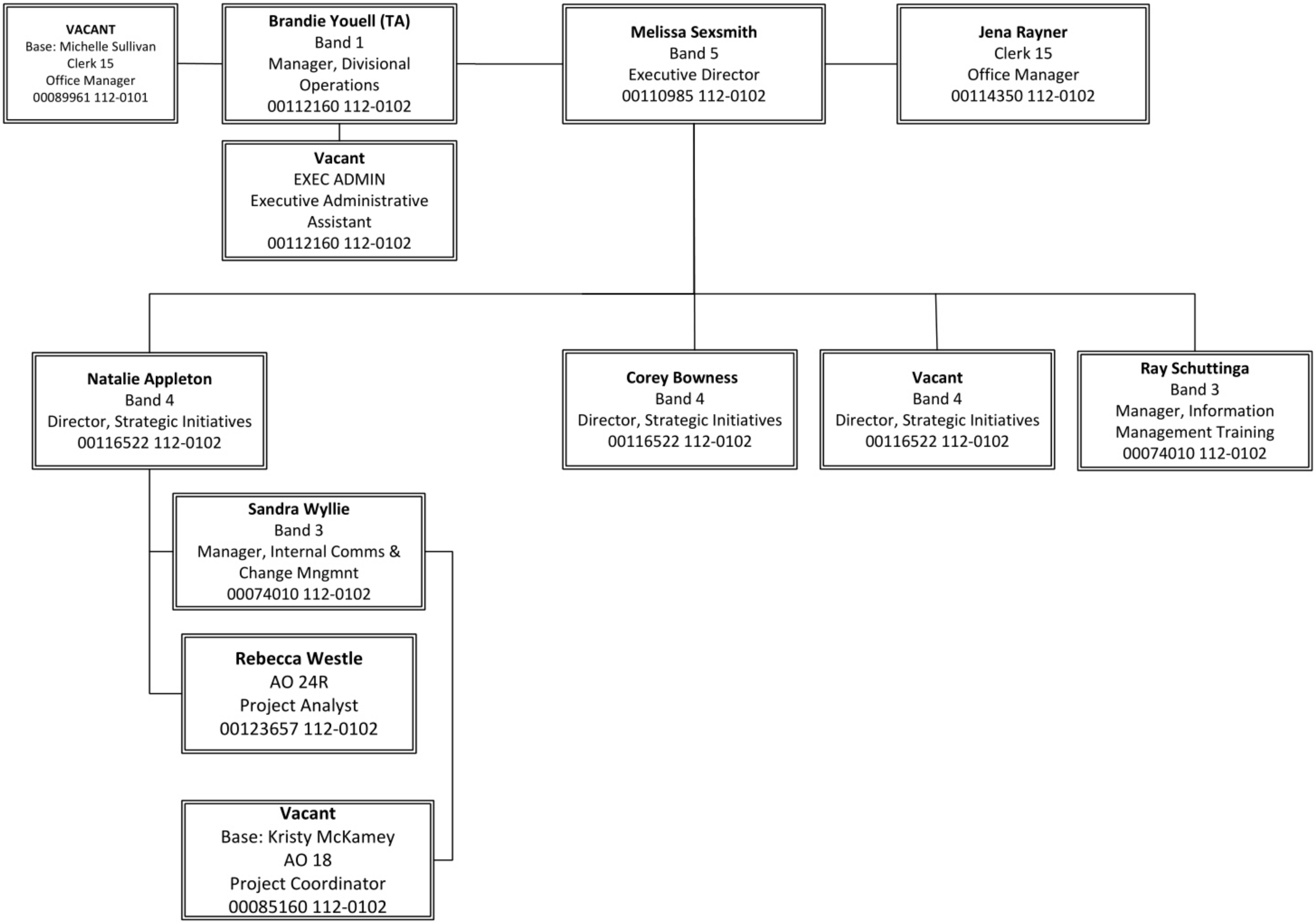
000112490 112-0106



Corporate Information and Records Management Office – Planning, Engagement and Corporate Operations September 2023

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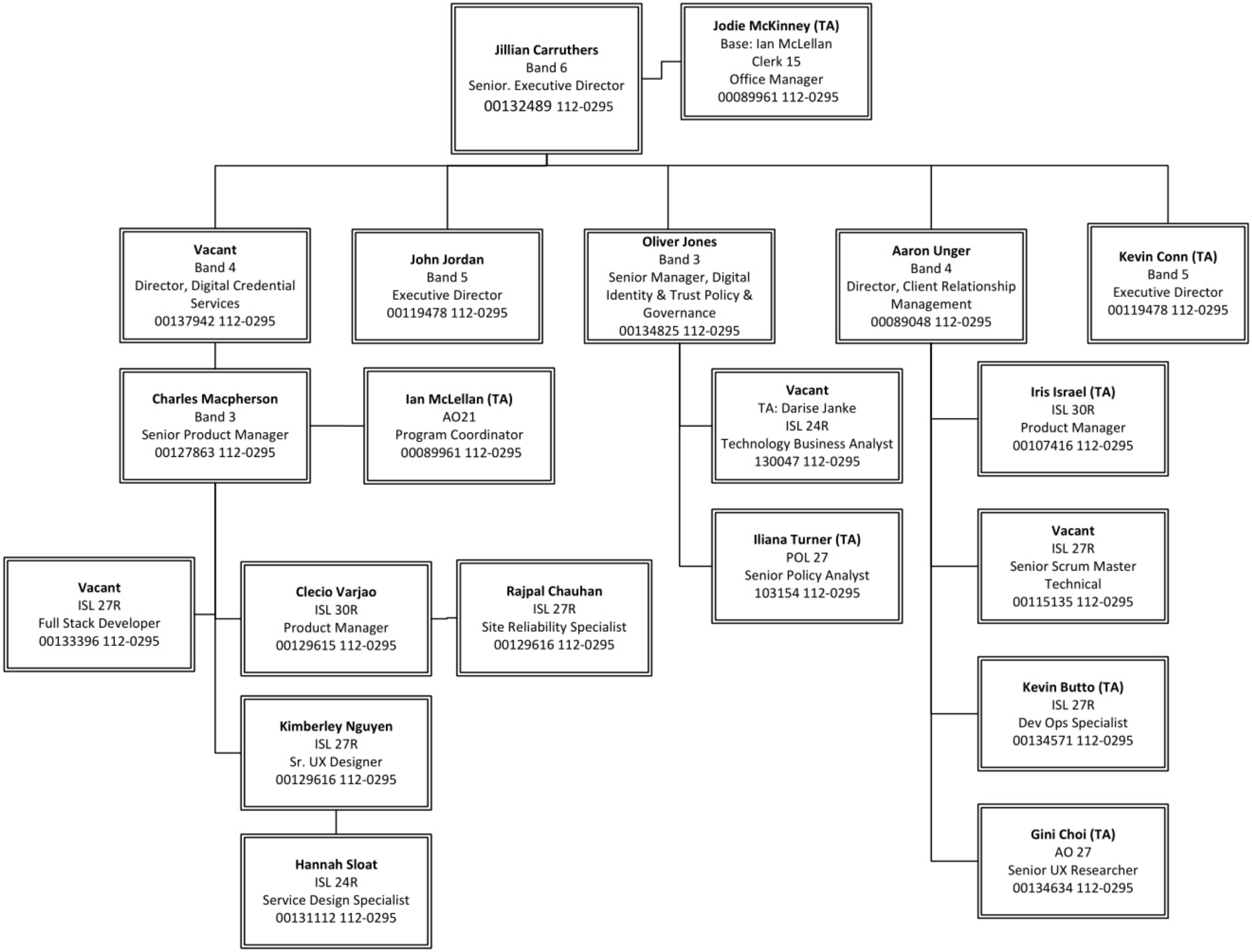
Corporate Information and Records Management Office – Strategic Policy and Legislation October 2023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BRITISH COLUMBIA

Ministry of Children and Family Development

MCFD Freedom of Information (FOI) Assessment

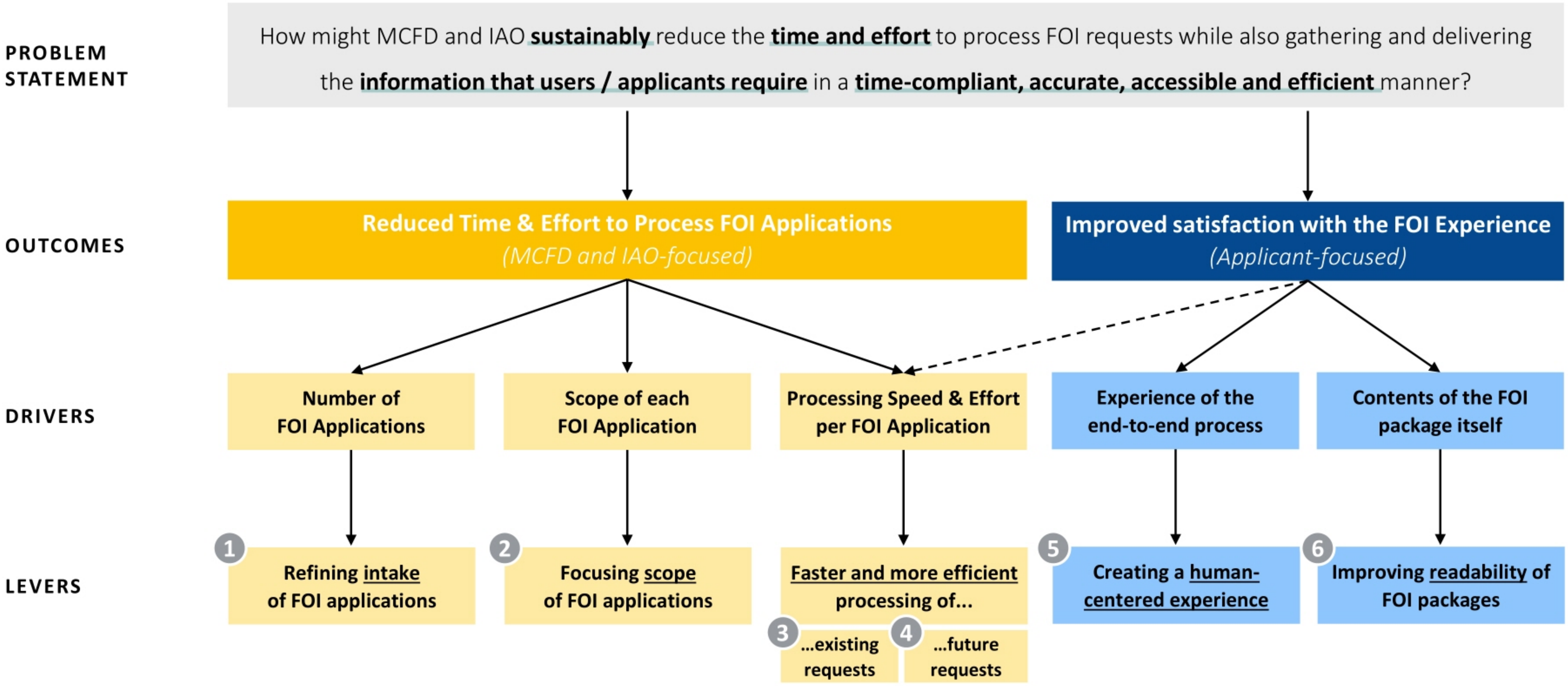
Final Report

October 2021

Contents

Executive Summary

We set out to solve the problem statement by breaking it down into component parts that could be influenced by recommendations



We identified six pain point themes from research with internal and external parties that informed the identification of potential solutions

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Internal (MCFD-IAO)

01 The understanding and adoption of **policies & procedures** varies between practitioners, creating inconsistencies

02 Limitations in the **design of the service** creates both challenges for requestors and increases processing time for staff

03 **Content management systems and processes** create additional challenges for staff

External (Applicant)

01 It is difficult to gain a **clear, concise and 'plain terms' understanding** of what information is available through FOI, how to articulate this, and the nature of the process

02 Requestors are disheartened by **negative expectation setting** from social workers, peers and analysts

03 Requestors sometimes feel that the process **lacks compassion and support** during what is an emotionally challenging time

From a list of 30 potential solutions (outlined in the recommendations section), we identified 12 priority recommendations based on an impact and effort analysis

Recommendation		Impact	Effort	Duration (Fiscal Quarters)
1A.	s. 13	Medium	Medium	Short (1 – 2 FQs)
1B.		High	Medium	Medium (3 – 6 FQs)
1C.	**Embed Pre-qualification Assessment in FOI Form**	Low	Medium	Short (1 – 2 FQs)
2A.	**Specify Types of FOI Info Available & Estimated Timelines**	High	Medium	Short (1 - 2 FQs)
3A.	s. 13	High	Medium	Short (1 – 2 FQs)
3B.	**Optimize Workflows between DDM & IAO**	Low	Medium	Short (1 – 2 FQs)
3C.	**Streamline Communications with Applicants**	Medium	Medium	Medium (3 – 6 FQs)
4A	s. 13	High	Medium	Medium (3 – 6 FQs)
4B		High	High	Medium (3 – 6 FQs)
4C		Low	Low	Short (1 – 2 FQs)
5A.	**User-Friendly Guides & Resources[1]**	High	Low	Short (1 – 2 FQs)
5B.	s. 13	High	Medium	Medium (3 – 6 FQs)

Notes: (1) Due to each recommendation sharing a KPI metric, our analysis was unable to determine the duration of recommendations 5A & 5B

Priority Recommendations (1 of 4)

1 Refining intake of FOI applications	2 Focusing scope of FOI applications

Recommendation	Description	(Key) Next Steps	Involved Parties	Dependencies
1A. s. 13		• Requires approval from MCFD Practice Division and Information Policy to incorporate into trainings • s. 13	**MCFD (Owner)**	Training approval; Change Management support
1B.		• Requires approval from MCFD Practice Division and Information Policy • s. 13 •	**MCFD (Owner)**, IAO, ISD	Approval by MCFD Executive Committee (creation of working group for process creation)
1C. Embed Pre-qualification Assessment in FOI Form	Update FOI request form with a pre-assessment survey to help applicants determine if an FOI request is the right type of request for information (e.g., on-demand disclosure process as an alternative) and / or if they are entitled to that information (e.g., due to third party info implications).	• Approval required by IAO • Work with FOI modernization team to incorporate this into their project • Seek additional input and guidance from the Behavioural Insights Group	**IAO (Owner)**, MCFD (SME)	FOI modernization scope: potential funding required
2A. Specify Types of FOI Info Available & Estimated Timelines	Update FOI application form to specify, clearly explain and provide applicants the option to select the different types of information available from MCFD (e.g., CS file, FS file, Resource File). Provide an estimated timeline based on the file(s) selected (prior to submission), suggestions for which files they may find most useful and visual examples of each.	• Approval required by IAO • Work with FOI modernization team • SME support required by MCFD Information Policy team • Seek additional input and guidance from the Behavioural Insights Group	**IAO (Owner)**, MCFD (SME)	FOI modernization scope: potential funding required

Priority Recommendations (2 of 4)

3

Faster and more efficient processing of existing requests

Recommendation		Description	(Key) Next Steps	Involved Parties	Dependencies
3A.	s. 13		• Work with ISD to further articulate the imperative (e.g., impact to staff and clients), define business requirements and prioritize requests	**MCFD-Info Mgmt. (Owner)**, ISD, MCFD-Change Mgmt.	ICM enhancements and backlog prioritization
3B.	**Optimize Workflows between DDM & IAO**	Reduce the number of emails and steps required for DDM staff to update and share files with IAO analysts by providing them access (i.e., licenses) to IAO's document management system.	• Coordinate with the FOI Modernization Team to ensure DDM staff have access to new case management system once implemented • Explore potential interim solutions to resolve DDM pain points until new case management system is implemented (e.g., expand AXIS licenses)	**IAO (Owner)**, MCFD (DDM)	FOI modernization scope
3C.	**Streamline Communications with Applicants**	Use automated workflows to provide applicants status updates to save analysts time (who are often managing an average of 20 applications at once that require clarification call reminders and status updates). This may also improve the applicant's overall experience.	• Coordinate with the FOI Modernization Team to explore ways to implement this feature in the new, soon-to-be-implemented case management system for FOI requests	**IAO (Owner)**, ISD	FOI modernization scope

Priority Recommendations (3 of 4)

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4

Faster and more efficient processing of future requests

Recommendation	Description	(Key) Next Steps	Involved Parties	Dependencies
4A. s. 13		• Approval required from Strategic Services and Practice to incorporate Change Management services as a regular practice • s. 13 •	**MCFD-Strategic Services (Owner)**, MCFD-Change Mgmt., ISD	Approval by FOI Project Steering Committee, Approval by MCFD Executive Committee (creation of working group for project)
4B.		• Seek approval from MCFD Practice Division and Information Policy to incorporate into training for social workers and admin, respectively • s. 13	**MCFD-Learning (Owner)**, MCFD-Change Mgmt., Info Mgmt., Practice	Approval by FOI Project Steering Committee, Approval by MCFD Executive Committee (creation of working group for project)
4C.		• Seek approvals from Practice and Policy to communicate changes to offices • s. 13 • Develop change management strategy to raise awareness	**MCFD-Learning, Policy (Owner)**, MCFD-Change Mgmt.; IAO	Approval by FOI Project Steering Committee, Approval by MCFD Executive Committee (creation of working group for project)

Priority Recommendations (4 of 4)

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5

Creating a human-centered experience

Recommendation		Description	(Key) Next Steps	Involved Parties	Dependencies
5A.	**User-Friendly Guides & Resources**	Develop guides and resources to assist applicants with the FOI submission process in various formats (e.g., video, one-pagers) that are widely-available (e.g., online, embedded in the application form, available at MCFD district offices). Have resources cover on-demand disclosures, qualification guidelines and showcase samples	• Approval required by IAO in order to move recommendation forward • Identify communication resources and teams that can support with development of new guides	**IAO (Owner)**, MCFD (SME)	Project funding potentially required
5B.	s. 13		• Requires approval from MCFD Practice Division and Information Policy to incorporate into training for social workers and admin, respectively • s. 13 •	**MCFD – Learning (Owner)**, Change Mgmt., Practice & Info Policy	Approval by FOI Project Steering Committee, Approval by MCFD Executive Committee (creation of working group for project)

In addition to the priority initiatives, the following ongoing actions should ensure the successful implementation of recommendations

Secure buy-in from critical stakeholders

Work with Service Delivery Division and Practice areas to share findings and hence the need for proposed recommendations, ensuring that the implementation meets the needs of these groups

Create ongoing forum for collaboration

Identity and stand-up a working group between MCFD, IAO and ISD to monitor ongoing implementation of initiatives, ensuring collaboration of teams that also include MCFD's Service Delivery Division and Practice areas

Identify and monitor key KPIs

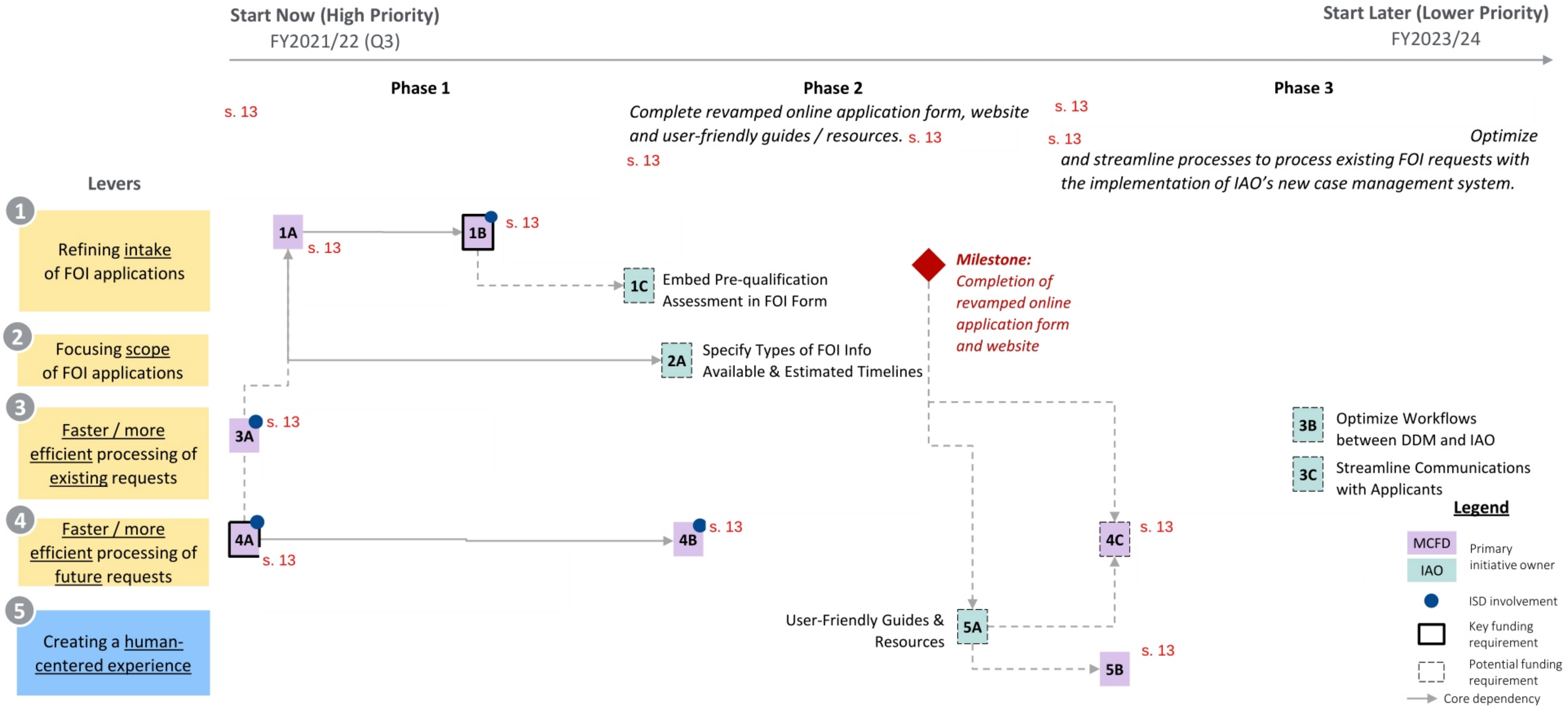
Select metrics by which the success of initiatives can be monitored in order to ensure that the problem statement is being addressed

Create and implement feedback loops

Identify and establish feedback loops for 1) staff processing requests, 2) frontline staff, and 3) requestors for qualitative data on initiative impact and continuous improvement

Executive Summary

A phased approach, sequencing the implementation of prioritized recommendations based on dependencies, can be leveraged to kick-start change



Notes: Roadmap does not reflect estimated duration

Summary of the potential impact of our recommendations (steady-state)

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A highly preliminary analysis of the potential impact of each recommendation (once implemented), suggests that MCFD and IAO **could save a total of** s. 13 **working days[1] per year** (steady-state[2]), which **equates to the work done by** s. 13 **FTEs[3] each year** (which can process s. 13 **FOIs each year[4]**).

Lever	Recommendation	Number of days saved (Conservative vs. Aggressive Estimates)	Impact by Lever
1 **Refining intake of FOI applications**	(1A s. 13 (1B) s. 13 (1C) Pre-qualification Assessment	s. 13	
2 **Focusing scope of FOI applications**	(2A) Process to Explain & Select Available Information		
3 **Faster and more efficient processing of existing requests**	(3A) s. 13 (3B) Optimize Workflows between DDM & IAO (3C) Streamline Communications with Applicants		
4 **Faster and more efficient processing of future requests**	s. 13		

Total FTE workload saved per year:

s. 13 **FTEs[3] per year**

(equates to processing s. 13 *FOIs per year[4])*

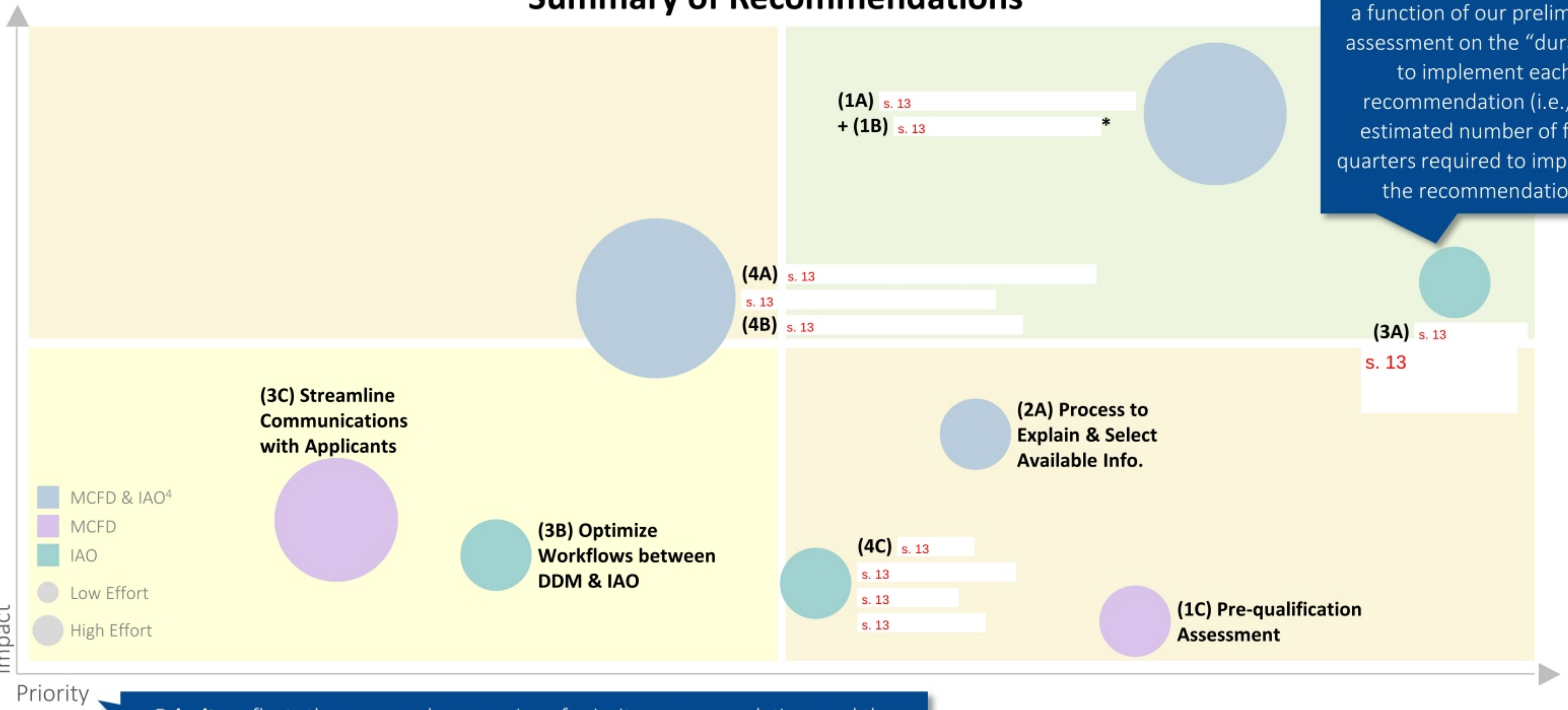
Notes: (1.) Working Days is calculated based on the estimated number of productive work hours per FTE per day (i.e., 6); (2.) This analysis uses 2019-21 MCFD FOI data as its baseline and assumes that all recommendations are implemented and benefits are realized simultaneously; overlapping benefits are not accounted for; (3.) FTE workload calculation is based on the estimated number of working days per FTE per annum (i.e., 230); (4.) Calculated by dividing the average number of FOIs processed between 2019-20 by the number of staff (across MCFD and IAO) that process MCFD FOI-related requests. (*) Due to each recommendation sharing a KPI metric, our analysis was unable to disaggregate the singular impact each one of these recommendations would have.

Summary of the potential impact, priority and effort of our recommendations (steady-state)

Ministry of Children and Family Development

A highly preliminary analysis of the potential impact of each recommendation (once implemented), suggests that MCFD and IAO **could save a total of** s. 13 s. 13 **working days[1] per year** (steady-state[2]), which **equates to the work done by** s. 13 **FTEs[3] each year** (which can process s. 13 **FOIs each year**).

Summary of Recommendations



Effort (the size of the bubble) is a function of our preliminary assessment on the "duration" to implement each recommendation (i.e., the estimated number of fiscal quarters required to implement the recommendation)

Impact measures the number of (steady-state) working days saved once the recommendation is implemented

Priority reflects the proposed sequencing of priority recommendations and the degree of direct and indirect dependencies on one another

Notes: (*) Due to each recommendation sharing a KPI metric, our analysis was unable to disaggregate the singular impact each one of these recommendations would have.

Project Overview

We created a simple logic structure to arrive at recommendations clearly linked to our observations

Ministry of Children and Family Development

1 Define the problem statement

What is the challenge that we are trying to overcome?

2 Investigate what's happening today

What are the pain points that need to be addressed for both MCFD and IAO staff, and FOI applicants?

3 Cluster pain points into themes

What are the emerging themes from the investigation?

4 Identify the drivers and associated levers

What are the factors driving the problem, and what are the associated levers that we can pull to address the problem?

5 Identify recommendations

What actions can we take to address these themes, grouped by the lever that they pull on?

6 Sequence recommendations into a roadmap

How might we sequence these actions in a work plan to deliver the change required?

Defining the problem statement

Ministry of Children and Family Development

Lasting, rather than one-time fixes, that are fiscally sustainable

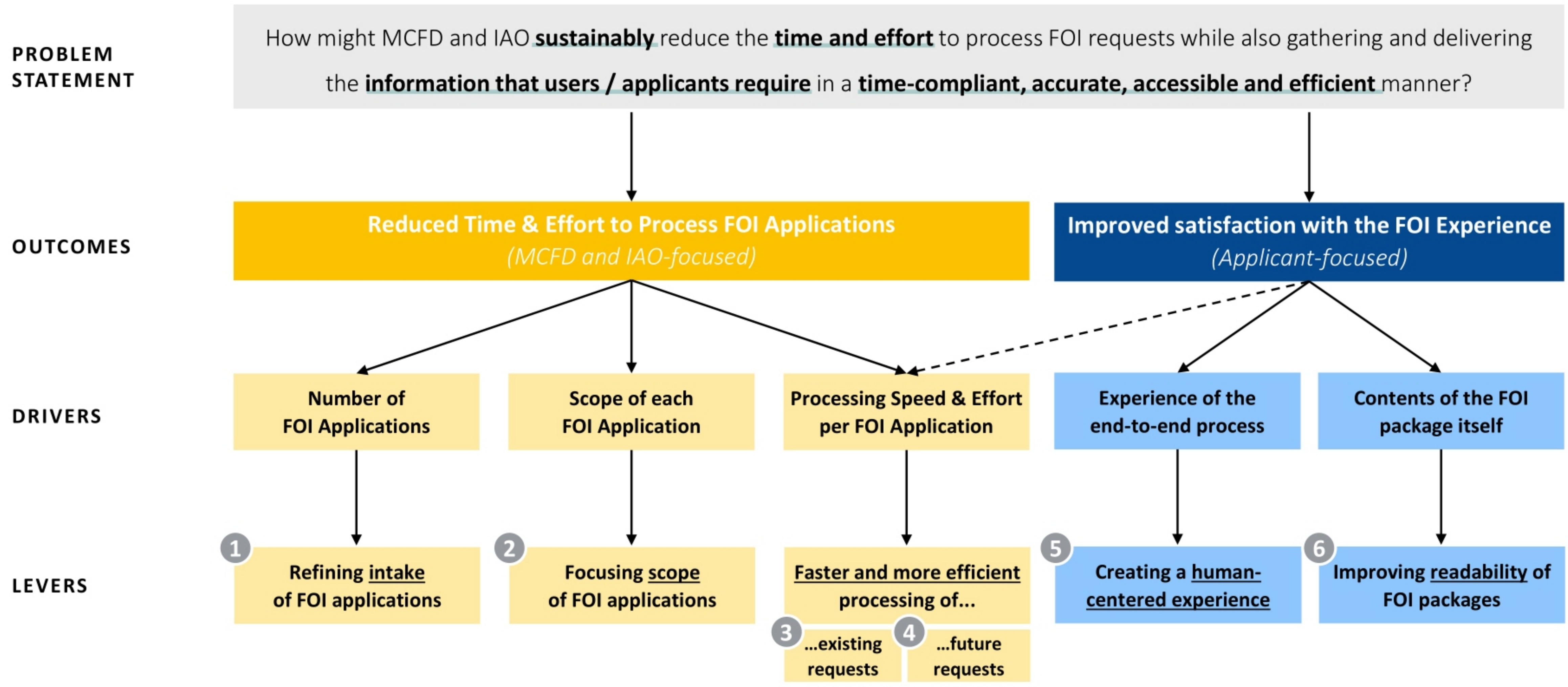
Across 3 levers: (1.) number of requests, (2.) pages per request, and (3.) time spent processing per page

How might MCFD and IAO **sustainably** reduce the **time and effort** to process FOI requests while also gathering and delivering the **information that users / applicants require** in a **time-compliant, accurate, accessible and efficient** manner?

Understanding what it is that users / applicants are actually trying to find out

Improving the overall experience of the process for users / applicants and ensuring our compliance to legislative requirements

Identifying the drivers and associated levers to address the problem statement

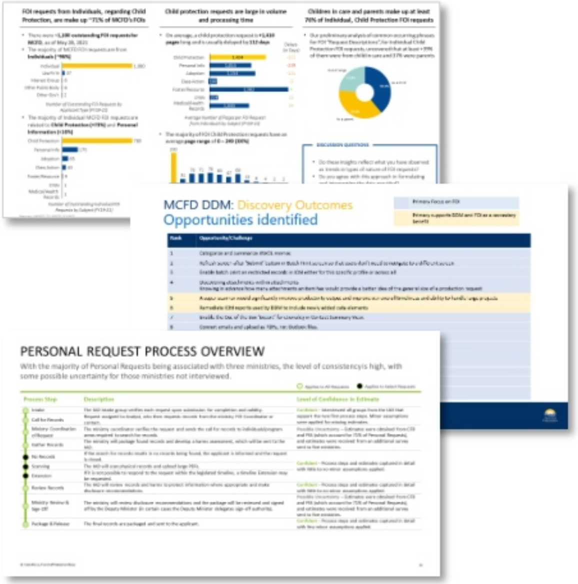


Project Overview

To address our problem statement, we went through four phases to develop a list of prioritized recommendations and high-level roadmap

1 Defining the focus

- Reviewed and consolidated prior analysis and docs
- Conducted quantitative analysis to understand and prioritize key drivers of MCFD FOI requests

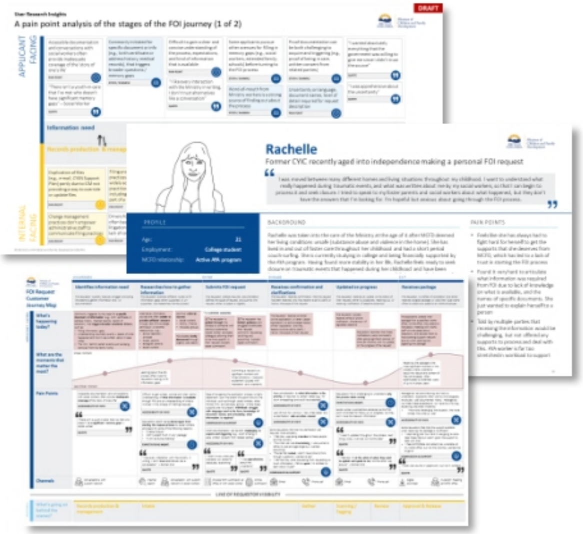


2 Conducting research

- Developed user interview plan and guide
- Arranged for and conduct user interviews
- Summarized interview insights

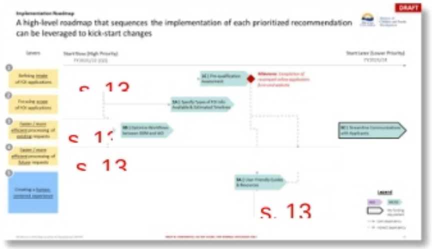
3 Defining personas and a journey map

- Arranged for and conducted stakeholder interviews
- Created integrated user journey maps and MCFD-IAO process maps
- Documented user and MCFD-IAO pain points
- Developed user personas (based on user / applicant and MCFD-IAO stakeholder interviews)



4 Creating recommendations and HL implementation roadmap

- Develop recommendations for prioritized pain points
- Create high-level implementation roadmap



We have a foundational understanding of the FOI process from work completed thus far

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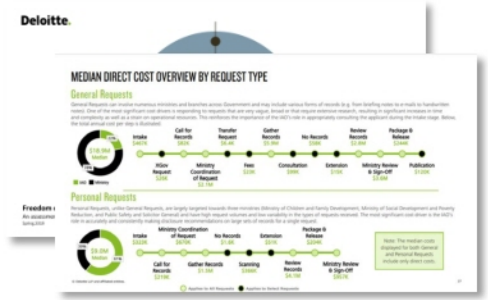
1 Costing review for FOI requests



SPRING 2019

Key Takeaways

- Across the IAO and all ministries, the FOI costs between $23-33M annually
- The 3 most costly steps of the process are 'Review Records', 'Ministry Review and Sign-off', and 'Gather Records'
- Requests are most costly when unspecific, unclear, too broad, require complex harms assessments, and involve multiple ministries
- A set of 10 recommendations was proposed across 'technology' and 'people and policy' (detailed in the Appendix)

2 MCFD DDM Discovery

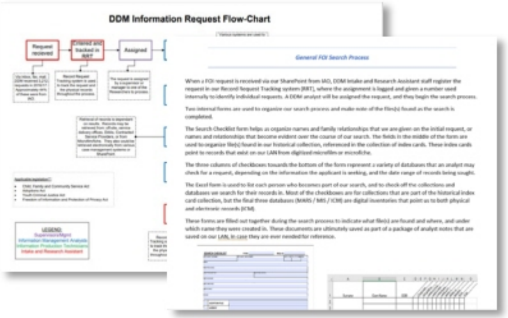
JANUARY 2021

- 14 tactical recommendations put forward specific to MCFD DDM internal processes, prioritized on impact and feasibility (focused on ICM)

Highest priority recommendations:

s. 13

3 Existing DDM Process Mapping



UNKNOWN

s. 13

-
-

4 FOI Service Design Project

SEPTEMBER 2018

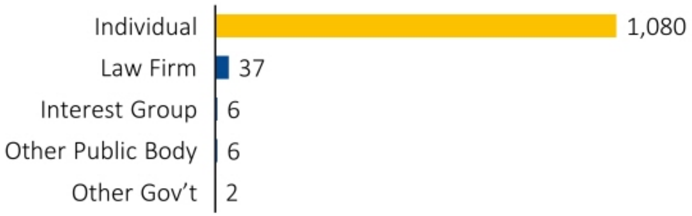
Three key themes for improvement:

- Improving application form and support resources for applicants
- Consistency and efficiency of application processing
- Transparent communication and partnership between MCFD and IAO

Our analysis reveals that Individual Child Protection FOIs drive MCFD's FOI requests and delays

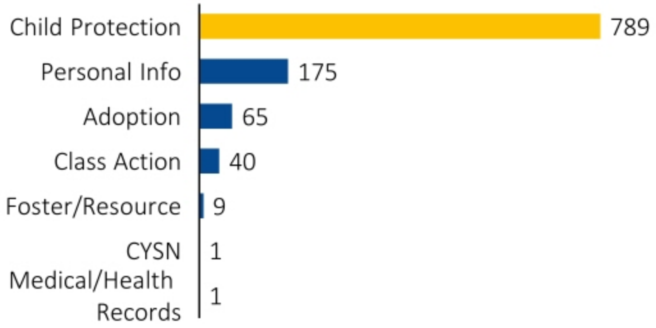
FOI requests from Individuals, regarding Child Protection, make up ~71% of MCFD's FOIs

- There were **1,100+ outstanding FOI requests for MCFD**, as of May 28, 2021
- The majority of MCFD FOI requests are from **Individuals (~96%)**



Number of Outstanding FOI Requests by Applicant Type (FY19-21)

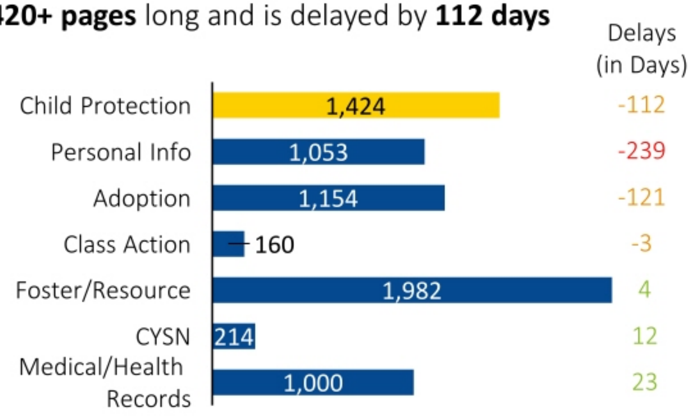
- The majority of Individual MCFD FOI requests are related to **Child Protection (73%+)** and **Personal Information (16%+)**



Number of Outstanding Individual FOI Requests by Subject (FY19-21)

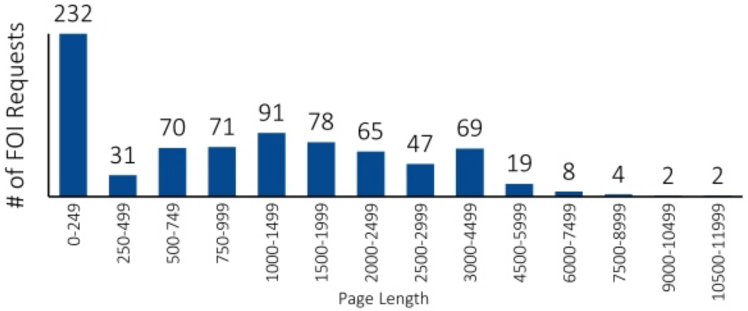
Child Protection FOI requests have a large number of pages and often experience delays

- On average, a Child Protection FOI request is **1,420+ pages** long and is delayed by **112 days**



Average Number of Pages per FOI Request from Individuals by Subject (FY19-21)

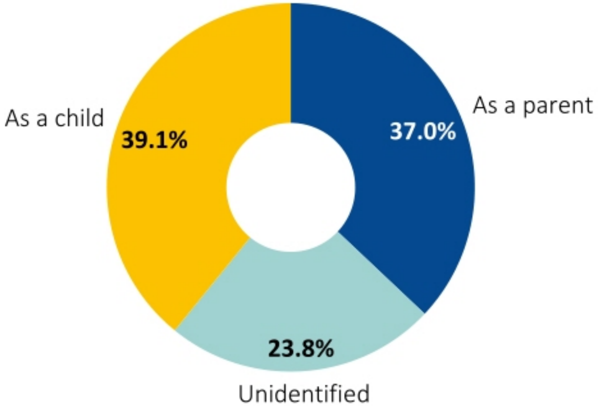
- A significant amount **(~47%)** of Child Protection-related FOI requests have a **page range** of **1,000 – 5,999**



Number of Individual Child Protection FOI Request by Page Length Range (FY19-21)

Children in care and parents make up most of these FOI requests and have large scope

- Our preliminary analysis of common occurring phrases for FOI "Request Descriptions", for Individual Child Protection FOI requests, uncovered that at least **39%** of them were **from child in care** and **37% were parents**



Persona Type Percentages of Individual Child Protection FOI Requests (FY19-21)

- Approximately **88% of** individual, child protection FOI **requests** contained the phrase **"all information" or "any information"**
- Between 2019 and 2020, there was a 6.3% increase in the number of FOI applications from individuals compared to a 0% increase from other types of applicants

Source: Data provided from IAO on June 2021 as it relates to MCFD FOI requests from FY 2019/20 and FY2021/21

External Insights

What are the objectives of conducting research with requestors?

The objective of the semi-structured interviews was to gain a deeper understanding of requestors' experience of the Freedom of Information (FOI) request process. This informed recommendations that sustainably reduce the time and effort to process FOI requests, meeting legislated requirements under FOIPPA, while also gathering and delivering the information that requestors require in a time-compliant, accurate, accessible and efficient manner.

We explored the following themes in our interviews:

1

Information needs

- What type of information is most commonly required?
- What motivates requestors' desire to collect information?
- How does this differ across different types of requestor? E.g. Parent vs. self
- How do requestors get directed to submitting an FOI?
- Is an FOI request the most effective way to gather the information that they require?

2

Experience of the FOI request process

- Is the FOI process easy to understand?
- Is the process accessible?
- Do requestors understand how to frame their request specifically to meet their information need?
- Do they understand the names of documents that they want access to?
- Do applicants want to be informed on the progress of their request?
- If so, what information is important?

3

Resolution of needs

- Does the information meet the needs of the requestor?
- Is it easy to understand and sort through?
- Do requestors typically have any follow-up questions on the information that they received?
- Are the channels for receiving that information well understood?

Why is gathering insights to inform personas and journey maps valuable?

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Validate ideas earlier

Personas and journey maps help stakeholders evaluate new initiatives. This can help eliminate wasting time, effort and money building things that requestors and staff do not want.

Make better decisions, faster

Does the design or feature further the goals or the requestor, or eliminate a pain point? If not, it may not be worth pursuing.

Empathize with requestors

Personas are the 'face' behind each request. Understanding the needs of these individuals helps to ensure that design and features meets real user needs and behaviours.

Create common understanding

Personas and journey maps make stories more compelling, creating a common and explicitly stated understanding amongst the team of who the service is being designed for.

How did we conduct our research?

Our Primary Research

10 ‘External’ Interviews

- Social workers (5)
- Past FOI applicants (5)
  - Submitted within 2 years of aging into adulthood (2)
  - Submitted later in life (3)

Surveys

- Survey feedback from MCFD Alumni of Care Community (6 responses)
- Survey feedback from Youth Advisory Council *(pending)*

In any research we conduct, we use **trauma-informed approaches**, pulling from the methods and teachings of leading government researchers.

We used three guiding principles for **structuring safety** in interviews and other engagement:

- **Eliminate power dynamics**
- **Confidentiality & creating a safe space**
- **Reframe tough decisions and situations**

Furthermore, we took practical steps to ensure the comfort of interviewees:

- **Conducted pre-calls to outline what to expect and answer any questions**
- **Gave option to have support from Youth Advisory Council Mental Health Co-Ordinator**
- **Ensured all information was anonymous and gave interviewees opportunity to redact any information shared during the interview**
- **Followed-up with interviewees to show how their input fed into recommendations**

This deliverable contains three key documents related to external insights

Ministry of Children and Family Development

1: User Personas

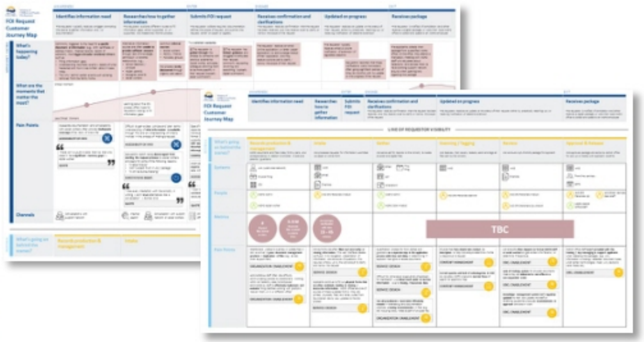
WHAT IS IT

- Four individual personas that represent the user groups identified in data analysis at the beginning of the project, drawing from insights across our interviews

PURPOSE

- To create a common understanding of the most numerous requestors
- To highlight common needs and pain points among these different groups

2: Customer Journey Maps



WHAT IS IT

- A framework that outline 'what is happening today' both from an applicant's perspective and internally within IAO and MCFD

PURPOSE

- To build a common understanding of the process
- To identify pain points from the perspective of the requestor and internal actors

3: Insight themes

WHAT IS IT

- A collection of six insight themes (three internal, three external) that summarize our findings

PURPOSE

- To summarize the outputs of our research in a digestible format
- To inform the development of recommendations

Rachelle

Former CYIC recently aged into independence making a personal FOI request

> "I was moved between many different homes and living situations throughout my childhood. I want to understand what really happened during traumatic events, and what was written about me by my social workers, so that I can begin to process it and seek closure. I tried to speak to my foster parents and social workers about what happened, but they don't have the answers that I'm looking for. I'm hopeful but anxious about going through the FOI process."

PROFILE

Age:	**21**
Employment:	**College student**
MCFD relationship:	**Active AYA program**

CHARACTERISTICS

Technology Literacy

Low — High

Extent of support network (outside of MCFD)

Low — High

Level of trust in MCFD

Low — High

Understanding of MCFD processes

Low — High

BACKGROUND

Rachelle was taken into the care of the Ministry at the age of 4 after MCFD deemed her living conditions unsafe (substance abuse and violence in the home). She has lived in and out of foster care throughout her childhood and had a short period couch-surfing. She is currently studying in college and being financially supported by the AYA program. Having found more stability in her life, Rachelle feels ready to seek closure on traumatic events that happened during her childhood and have been linked to her mental health struggles. She has (unsuccessfully) tried to find some of the information from previous social workers, school principals, and foster parents. Her AYA social worker has recommended submitting a personal FOI request.

PRIMARY NEEDS

- Documentation proving special developmental needs to access additional supports at college
- Address history for background checks on a new job

EMOTIONAL NEEDS

- Understanding the reasoning behind certain decisions that MCFD made, such as removing her from a foster home
- Filling memory gaps to seek closure on traumatic events that occurred

PAIN POINTS

- Feels like she has always had to fight hard for herself to get the supports that she deserves from MCFD, which has led to a lack of trust in starting the FOI process
- Found it very hard to articulate what information was required from FOI due to lack of knowledge on what is available, and the names of specific documents. She just wanted to explain herself to a person
- Told by multiple parties that receiving the information would be challenging, but not offered any supports to process and deal with this. AYA worker is far too stretched in workload to support

NOTE: These personas are fictitious characters designed to convey common experiences amongst different groups of people

Claudia

Former CYIC making FOI request later in life

> “I have two children, 9 and 6, who have started asking lots of questions about my history. It made me realize that there are still lots of things that I don’t understand properly from my childhood – medical history, address history, the reasons why I was moved into different homes. I want to understand these things so that my children can have the certainty that I never did.”

PROFILE

Age:	**41**
Employment:	**Nurse Practitioner**
MCFD relationship:	**Former CYIC**

CHARACTERISTICS

Technology Literacy

Low High

Extent of support network (outside of MCFD)

Low High

Level of trust in MCFD

Low High

Understanding of MCFD processes

Low High

NOTE: These personas are fictitious characters designed to convey common experiences amongst different groups of people

BACKGROUND

Claudia spent 10 years of her childhood in foster placements, after which, she trained to become a nurse practitioner. She later had two children with her husband, Mark. As her children have grown older, she has found herself wanting to understand some of the context around flashbacks and triggers that she still has, in addition to some specific documentation on medical, address and placement history. She has a stable and supportive network around her, but no longer understands MCFD processes as it has been so long since she engaged with the ministry. She struggled to find information about the process, until she found support from a colleague who had been through the process before.

PRIMARY NEEDS

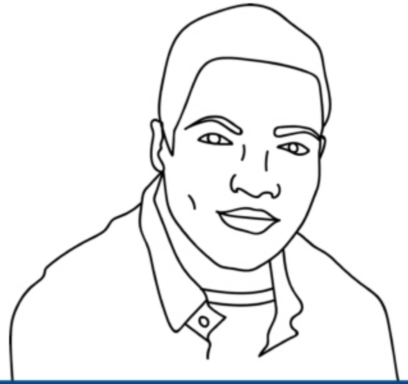
- Wanting to provide children with information about herself
- A clear understanding of the FOI process given current lack of involvement with the Ministry

EMOTIONAL NEEDS

- Understand additional context of flashbacks and triggers that have shaped who she is today
- Understand what social workers and others thought and wrote about her

PAIN POINTS

- Not knowing what files are available through the FOI process, and how to access them, particularly the vagueness of the ‘describe your request’ box
- Kept expectations low which was reinforced by the Ministry in my call to clarify what I wanted
- Not updated throughout the process
- Little consideration to how or where I wanted to receive the files
- Feeling like MCFD assumed that I couldn’t handle the information
- Poor quality physical files with lots of short-hand notation that made the package difficult to piece together



BRITISH COLUMBIA | Ministry of Children and Family Development

Aaron

Biological parent of child taken into care, making a personal FOI request

> "I was going through a really challenging time in my life and my child was taken away by the Ministry. I didn't agree with their decision making process so I want to know the reasons that my child was taken away, what was said about me by social workers, and what happened to my child while they weren't in my custody."

PROFILE

Age: **38**

Employment: **Labourer**

MCFD relationship: **Biological parent of child taken into care**

CHARACTERISTICS

Technology Literacy (Low – High)

Extent of support network (outside of MCFD) (Low – High)

Level of trust in MCFD (Low – High)

Understanding of MCFD processes (Low – High)

NOTE: These personas are fictitious characters designed to convey common experiences amongst different groups of people

BACKGROUND

Aaron has a history of substance abuse and, during a particularly unstable period in his life, was evicted from his accommodation. Aaron, his wife, and their 5 year old child had to move into temporary motel accommodation. MCFD intervened to remove the child. Aaron felt extremely angry, and that the Ministry made very little effort to support them as a family before taking their child into care. He wants to understand the decision-making process that occurred during this time, and what was written about him. They now live in more stable accommodation, and the child has returned home, but Aaron wants to understand what happened to their child while in care. He doesn't trust that the FOI process will give him what he's looking for.

PRIMARY NEEDS

- Documentation to support ongoing court proceedings against MCFD
- Documentation of address history for his child to support a passport application

EMOTIONAL NEEDS

- Understanding the decision-making process in the Ministry when child was removed from home
- Filling the gaps in understanding of decisions made about child while in care

PAIN POINTS

- Challenging to find information on the FOI process – lacking trust in MCFD
- Timelines extended multiple times despite some documentation being prioritized for court proceedings
- Hard to understand the package – large quantity of materials and correspondence but limited write-up of the decision making process that occurred behind the scenes

Ministry of Children and Family Development

Claire

Social worker who sometimes supports youth and families in making FOI requests

> "I believe that it is every youth's right to have access to their own information, either through direct sharing, or the FOI process. I would love to better support youth with this, but I'm unclear on what documents or information I can and can't share. My caseload, and minimal resources & training on the FOI process limits the support I can provide."

PROFILE

Age:	**35**
Employment:	**MCFD**
MCFD relationship:	**Social worker**

CHARACTERISTICS

Technology Literacy

Low — High

Extent of support network (outside of MCFD)

Low — N/A — High

Level of trust in MCFD

Low — High

Understanding of MCFD processes

Low — High

NOTE: These personas are fictitious characters designed to convey common experiences amongst different groups of people

BACKGROUND

Claire has been a Children & Youth Social Worker for 15 years, most recently supporting youth in their transition into adulthood. She commonly advises youth and their families to explore the FOI process as a means to access historical information, some of which she does not have access to or is not allowed to share. Sometimes she supports youth in completing the application form when they come to the office for support, but her involvement ends beyond the point of submission. When the youth that she advises receive their package, her relationship with that individual has usually ended.

PRIMARY NEEDS

- Readily accessible information and resources to explain the FOI process to the youth that she works with
- A contact in the Ministry to ask specific questions or clarifications

EMOTIONAL NEEDS

- A feeling of unease about whether the youth she works with have the supports around them when they receive their package to process and understand the information contained

PAIN POINTS

- Unclear documentation and record keeping practices
- Lack of understanding of the FOI process itself
- Heavy caseload that limits the amount of time that can be spent explaining the FOI process to youth
- Unclear on what documentation and information can be shared with youth without having to go through the FOI process
- Lack of support for clarification questions with respect to information sharing and FOI

Ministry of Children and Family Development
BRITISH COLUMBIA

FOI Request Customer Journey Map

AWARENESS | ENTER | ENGAGE | EXIT

Identifies information need

The requestor typically receives a trigger prompting the desire to gather information and / or documentation

Researches how to gather information

The requestor explores different routes to fill information gaps, either supported or un-supported, and researches the FOI process

Submits FOI request

The requestor collects required documentation, defines the scope of request, and submits the request, either on paper or digitally

Receives confirmation and clarifications

The requestor receives confirmation that the request has been received, and may receive a call to clarify or narrow the scope of the request

Updated on progress

The requestor receives an update on the status of their request, either by proactively reaching out, or receiving notification of deadline extension

Receives package

The requestor is notified of completion and either receives a digital package, or visits their local MCFD office to collect and speak to an MCFD employee

APPLICANT FACING

What's happening today?

Identifies information need:

Commonly triggered by the need for **a specific document or information** (e.g., birth certificate or address history, medical records, record of adoption), that **triggers broader emotional drivers** such as:
- Filling information gaps
- Understanding traumatic events – details of what happened and how it was written about in case notes
- The 'why' behind certain events such as being removed from the family home

Researches how to gather information:

Alternative information sources are often **unable to provide sufficient answers** through lack of knowledge, permission or severed relationships. E.g.,:
- School teachers / principal
- Foster parents
- Biological parents
- Social workers

Common **referral sources:**
- Social workers
- Family / friends
- Advocacy groups

FOI process **rarely discovered** through organic web search

Submits FOI request:

Two **common scenarios:**

1) The requestor is **guided through** the process by someone with previous experience (social worker, advocate, colleague) allowing them to be more specific in their request (typically paper submission)

2) The requestor has **limited guidance** and struggles to articulate their request, commonly requesting 'anything and everything' (typically digital submission)

Receives confirmation and clarifications:

The requestor receives an email (online application) or letter (paper application) to acknowledge receipt of their application, and may receive a phone call to clarify / narrow the scope of their request.

Updated on progress:

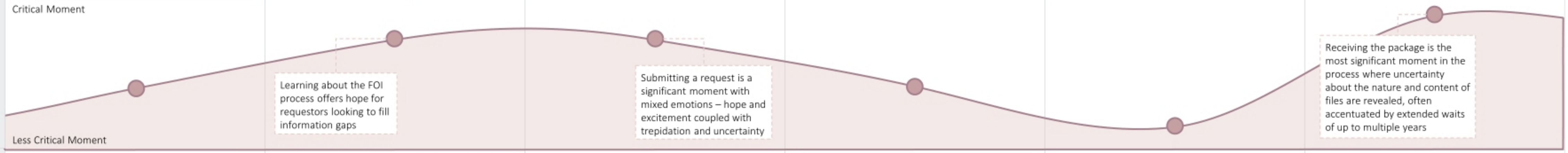
The requestor typically receives email or phone notification of extension of legislated deadline

Requestors reported that these notifications were inconsistent, often going significant periods of time (3+ months) with no update on the progress of the request

Receives package:

The applicants collects their package from a specified MCFD office. At the office, they attend a mandatory meeting with MCFD staff who educates about redactions, and advises them to have a strong support network around when opening and digesting the package

What are the moments that matter the most?



Pain Points

Identifies information need:

Accessible documentation and conversations with social workers often provide **inadequate coverage** of the 'story of one's life'
ACCESSIBILITY OF INFO

"There isn't a youth-in-care that I've met who doesn't have **significant memory gaps**" – Social worker
QUOTE

Researches how to gather information:

Difficult to gain a clear, concise and 'plain terms' understanding of **what information is available** through FOI, and an understanding of what is involved in the process of making a request.
ACCESSIBILITY OF INFO

Requestors report being **discouraged from starting the request process** by social workers and peers for some of the following reasons:
- "It takes forever"
- "Don't expect much in your package"
- "It will be re-traumatizing"

EXPECTATIONS MGMT.

"I like every interaction with the Ministry in writing, I don't **trust** alternatives like a conversation" – Former CYIC
QUOTE

Submits FOI request:

Ease of navigating the application process is highly dependent upon the extent of support around the individual, such as through social workers, other former CYIC, and advocacy groups. Where these supports are not present, **individuals struggle with language used in the form, knowledge of document names, and articulating what information is required**
COMPASSION & SUPPORT

Proof documentation can be both **challenging to acquire and triggering** (e.g., proof of being in care, written consent from related parties)
ACCESSIBILITY OF INFO

"I didn't know what was available, so I asked for absolutely everything"
QUOTE

"I was **apprehensive** about the uncertainty"
QUOTE

Receives confirmation and clarifications:

Rare consideration to **what information is the priority,** or required by certain dates (e.g., for court proceedings and could be expedited)
ACCESSIBILITY OF INFO

Lack of trust for unknown / Gov of BC Caller ID's, so clarification **calls are often missed**
ACCESSIBILITY OF INFO

Some requestors felt that the clarification call required more empathy:
- "I felt like I was being a **burden** to these people and the Ministry"
- "The initial call was **traumatizing**, I was pushed to refine my ask and age range but I wanted everything"
- "The call felt **rushed**, I didn't have time to think through questions I wanted to ask"
- "I felt like they were dissuading from requesting so much information. I felt so **upset**. I'm entitled to learn about myself"

COMPASSION & SUPPORT

Updated on progress:

Requestors find it challenging to understand **why the process takes so long**
EXPECTATIONS MGMT.

Social worker is sometimes perceived as the first point of contact for follow-up on progress, but they don't have the relevant information
ACCESSIBILITY OF INFO

"I wasn't updated throughout the process. Next thing I knew, it arrived 10 months later"
QUOTE

"I feel like I'm **at the whim of when they want to update and speak to me**, not the other way around" – Former CYIC
QUOTE

Receives package:

Package can be overwhelming and hard to understand. Applicants often want a chronologically structured, well documented history. Package did not meet these expectations nor have this info (e.g., explaining traumatic incidents)
- "The more challenging the situation, the more limited the write-up was"

ACCESSIBILITY OF INFO

Some requestors feel that the support available when receiving the package is insufficient:
- "I kept being told how hard it was going to be to read these files but wasn't given the support to deal with that"
- "I feel comfortable and able to be vulnerable at my MCFD office, but not the one they wanted me to go to"

COMPASSION & SUPPORT

"There was volume in paperwork, but not in content"
QUOTE

Channels

Identifies information need	Researches how to gather information	Submits FOI request	Receives confirmation and clarifications	Updated on progress	Receives package
Conversations with support network	Internet search; Conversation with support network or social workers	Physical form submission at office or with social worker; Online submission	Email; Phone call	Email; Phone call	Digital download; In-person meeting at MCFD office

LINE OF REQUESTOR VISIBILITY

INTERNAL

What's going on behind the scenes?

Records production & management | Intake | Gather | Scanning / Tagging | Review | Approval & Release

01 Accessibility of information

OBSERVATIONS

- “I wouldn't have known at the time what different kinds of files were available to me through the FOI process”
- “I got conflicting information about the process from different sources”
- "The process is entirely misunderstood; I still don't really understand after 3 years of working here“
- “The language on the online form was tough to understand. Too much at once, hard to deal with because of my ADHD”
- “I didn't know how to explain in the application form what I wanted. I just wanted to fill the gaps in my life”
- “I didn’t answer the phone at first because it was from a random Caller ID – there was no message, so I nearly missed the deadline to confirm I still wanted my files”
- “I went to my social worker to get an update on progress, but they didn’t have the information I was looking for”

INSIGHTS

- Accessible documentation, conversations with social workers and others in the support network often provide inadequate coverage of the ‘story of one’s life’
- It is difficult to gain a clear, concise and ‘plain terms’ understanding of what information is available through FOI, and an understanding of what is involved in the process of making a request
- Applicants often struggle to articulate their needs in the description box of the request form, either through lack of clarity in what they want, or lack of understanding of what documents this information would be contained within. As a result, ‘all my files’ is commonly stated
- There is commonly a lack of trust in the government from requestors which can make communication and clarification challenging. I.e., not picking up phone calls

IMPLICATIONS

- How might we empower social workers and individuals to access their information where appropriate and compliant?
- How might we improve understanding in the community of what the FOI process is, how it works, and the documentation available to individuals?
- How might we assist applicants in clearly articulating the information that they need to ensure that the package meets their specific needs?
- How might we make communication regarding ones request simpler and trusting?

02 Management of expectations

OBSERVATIONS

- "I kept my expectations low, and this was re-inforced by messaging from the government“
- “My social worker said – ‘don't expect much, it takes forever’”
- “I wasn't updated throughout the process, next thing you know, it [the file package] appeared”
- “I stopped getting letters saying that it was still being processed so had to follow-up directly”
- “I was apprehensive about the uncertainty”
- “I feel like I'm at the whim of when they want to update and speak to me, not the other way around”
- “It was frustrating – I didn’t know if it would have the answers I was looking for after so long waiting”
- “I built up expectations for so long and it didn't deliver”
- “There was volume in paperwork, but not in content”

INSIGHTS

- Requestors are often discouraged from starting the process by negative expectation setting with respect to the length of the process, and the quality of information contained in the document package. This can be from social workers, friends / family with experience of the process, or intake analysts
- Status updates on the progress of the request are inconsistently received
- Some requestors have high expectations of the information that they will receive in their package, which is often not met, exacerbated by the extended timelines that build anticipation

IMPLICATIONS

- How might we set realistic yet positive expectations for individuals before they begin the FOI process, with respect to the nature of the process, the time it takes, and what they can expect to receive?
- How might we most efficiently and effectively give timely updates to applicants on the status of their request?

03 Compassion & support

OBSERVATIONS

- "I felt like I was being a burden to these people and the Ministry"
- "The initial call was traumatizing, I was pushed to refine my ask and age range but I wanted everything"
- "I felt like they were dissuading from requesting so much information. I felt so upset. I'm entitled to learn about myself"
- "I wish someone had sat down with me to read and answer questions I had about my application"
- "I just wanted to explain myself and what I wanted to a person"
- "I kept being told how hard it was going to be to read these files but wasn't given the support to deal with that"
- "I feel comfortable and able to be vulnerable at my MCFD office, but not the one they wanted me to go to"

INSIGHTS

- Calls from analysts to refine and / or narrow scope of the request can be perceived as working against, rather than with the requestor
- Ease of navigating the application process is highly dependent upon the extent of support around the individual, such as through social workers, other former CYIC, and advocacy groups. Where these supports are not present, individuals struggle with language used in the form, knowledge of document names, and articulating what information is required
- Some requestors want support in receiving their FOI packages, both in understanding what it contains (i.e., jargon, chronology), and processing the implications of receiving this new information
- It is important for the requestor to feel in-control of the process, particularly in receiving the package. For example, being able to specify where they would like to pick the package up from

IMPLICATIONS

- How might we frame clarification / scoping calls to ensure that requestors feel the purpose is to support them in receiving more specific information and documentation in a timely manner?
- How might we ensure that requestors feel supported in making their request, and that this support is equally accessible to all?
- How might we ensure that requestors receive necessary support during and after receiving their FOI packages?
- How might we better cater to individual needs in receiving FOI packages without introducing unnecessary complexity?

Internal Insights

Internal insights were informed by four activities

Ministry of Children and Family Development

The purpose of gathering internal insights was to collect insights, data and experiences from staff who collect, store and disclose information throughout the FOI process. This was informed by four key activities:

1

Review and validate FOI and information collection processes

Gather insights from stakeholders and leverage previous Deloitte projects around FOI and disclosure processes to summarize, review and validate current state processes with staff members.

2

Map systems, files and communication channels

Conduct a deeper analysis into behavioural patterns around storage and collection of information, file types, systems, and the communication channels used between IAO, MCFD, and ISD.

3

Catalogue documentation and knowledge management

Index sources of truth for how staff determine definitions, categories, and policies for information collection processes.

4

Elicit perspectives of staff on processes

Interview staff to hear their experiences with FOI processes to highlight pain points and possible areas of improvement.

We spoke to staff involved in each phase of the FOI process across MCFD, IAO and ISD in order to create process maps, pain points and create the internal journey map

Ministry of Children and Family Development

FOI Input — **High-level FOI Process**

Records Prod. & Mgmt.[2]	Intake	Gather	Scanning / Tagging	Review	Approval & Release
Meghan Kane, IAO **Kelly** MacKinnon, MCFD **Naila** Dharshi, ISD *RE: Policies*	**Melissa** Page, IAO **Gitta** Fekete, IAO *RE: Request validation*	**Kyle** Ericksen, MCFD **Sherri** Thomas, MCFD *RE: Call for records*	**Meghan** Kane, IAO **Jonelle** Weinrich, IAO **Gitta** Fekete, IAO **Jason** Guest, IAO	**Melissa** Page, IAO **Rosemary** Deacon, IAO *RE: Ministry consultation*	**Meghan** Kane, IAO **Jonelle** Weinrich, IAO **Elise** Forslund, IAO *RE: Approval protocols*
Adrian Miguez, MCFD **Angela** Power, MCFD **Pearl** Best, MCFD **Ray** Larson, ISD *RE: Systems and training*	**David** Hughes, IAO **Rosemary** Deacon, IAO **Elise** Forslund, IAO **Jennifer** Sitar, IAO *RE: Data request*	**Kelly** MacKinnon, MCFD **Pearl** Best, MCFD *ICM*		**David** Hughes, IAO **Jennifer** Sitar, IAO *RE: QA and checklist*	
Sherri Thomas, MCFD *Document management*	**Meghan** Kane, IAO **Jennifer** Sitar, IAO *Letter templates and questions for clarification*	**Social Worker Focus Group** *(3x social workers)*			

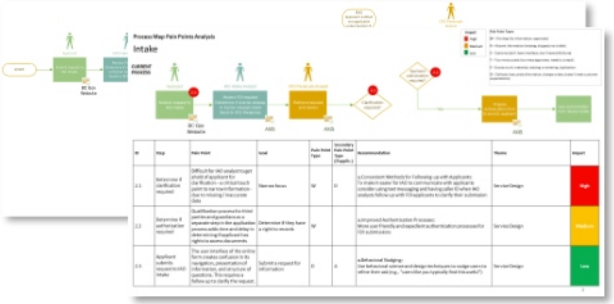
Our Primary Research

13 'Internal' Interviews

- IAO Analysts and Reviewers (8)
- MCFD Admins and Technicians (5)
- MCFD Social Workers (3)
- ISD Business Analysts (2)

The research allowed us to create three key documents related to internal insights

1: Business Process Maps



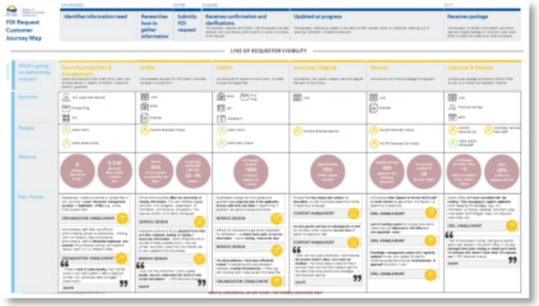
WHAT IS IT

- A detailed set of process maps that outlines each stage of the journey with associated pain points, actors and systems

PURPOSE

- To create a common understanding the details of the process, including which parties are responsible for each step
- To highlight common needs and pain points among these different internal groups

2: Internal Journey Maps



WHAT IS IT

- A framework that outline 'what is happening today' internally within IAO and MCFD

PURPOSE

- To build a common understanding of the process
- To identify pain points from the perspective of the requestor and internal actors

3: Insight themes

WHAT IS IT

- A collection of six insight themes (three internal, three external) that summarize our findings

PURPOSE

- To summarize the outputs of our research in a digestible format
- To inform the development of recommendations

Our staff interviews produced process maps to outline key phases of the FOI process

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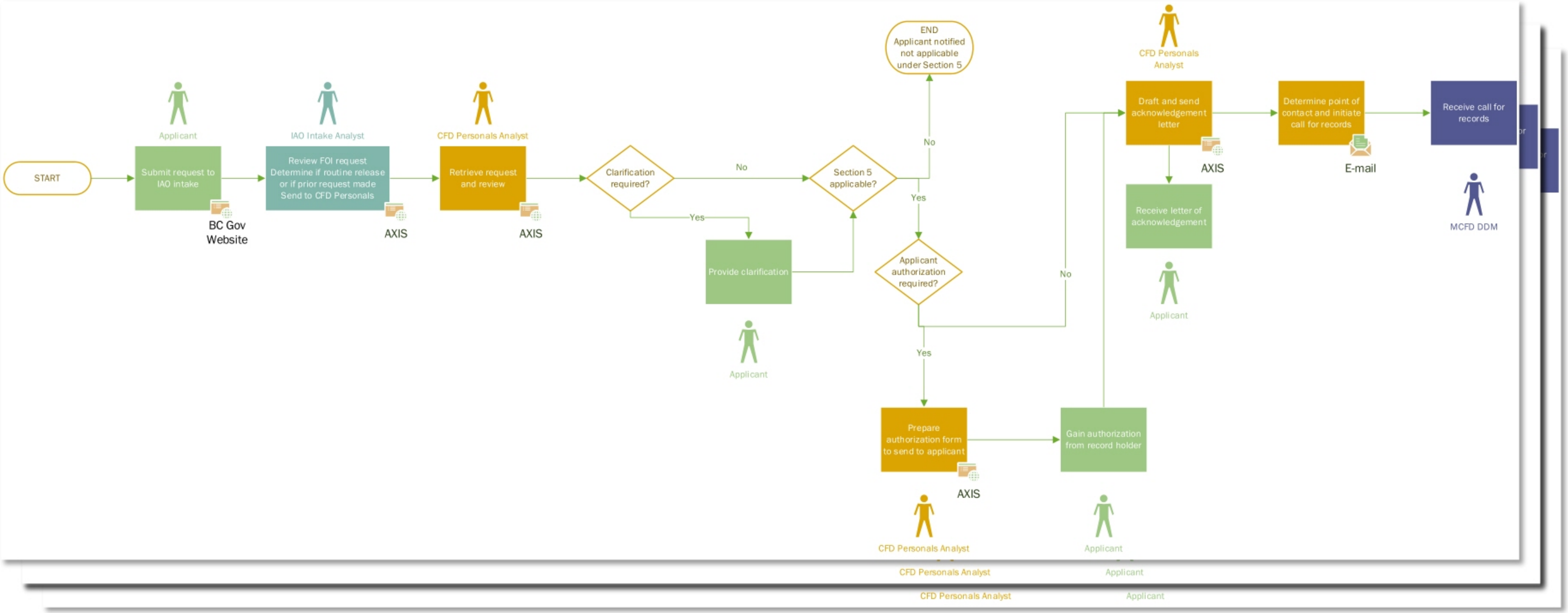

Illustrative example See appendix for links to extensive process maps

Our interviews also revealed key pain points that contributed to the large volume of and delay in processing FOI requests

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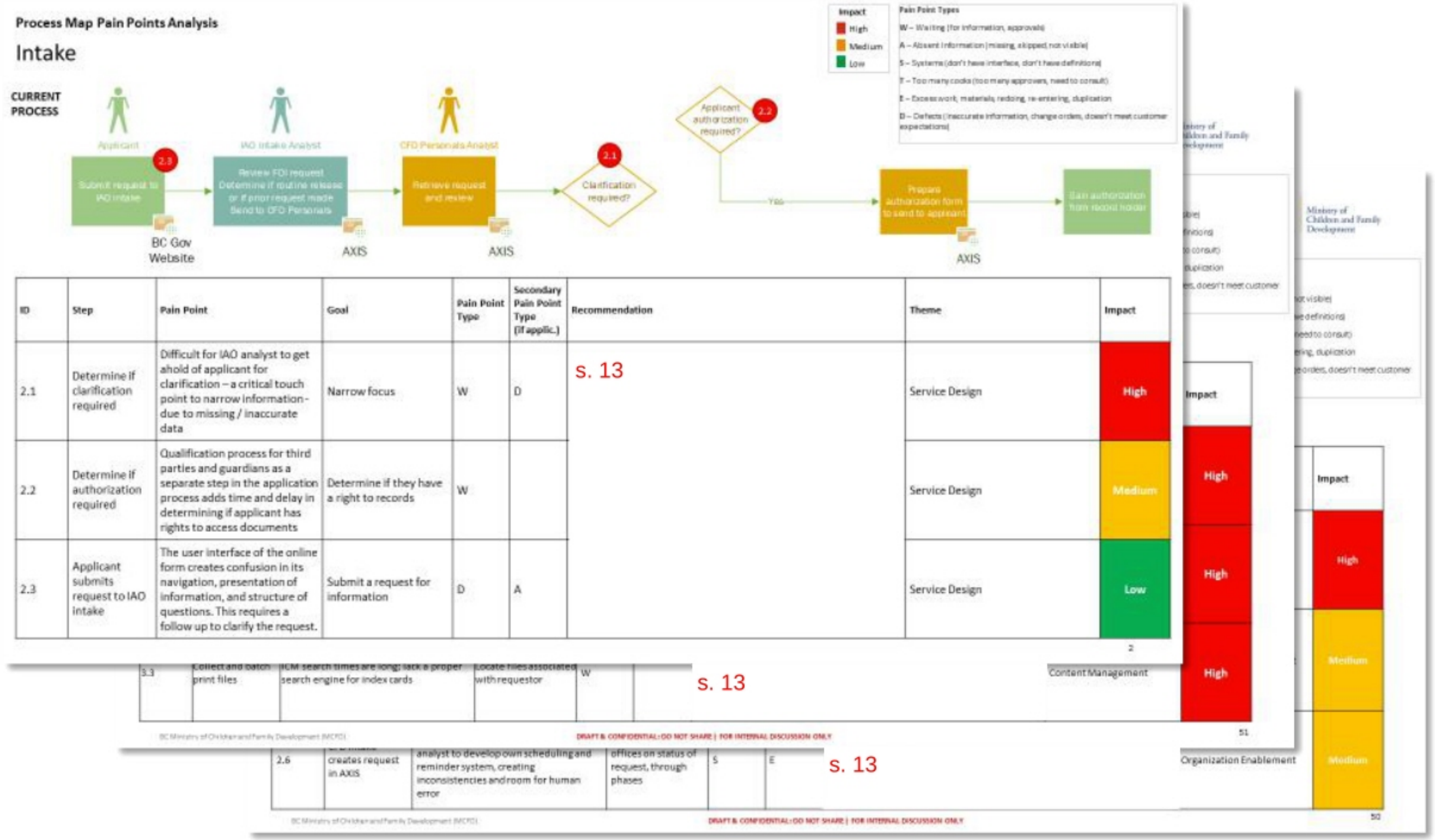
Ministry of Children and Family Development



Process Map Pain Points Analysis

Intake

CURRENT PROCESS

ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
2.1	Determine if clarification required	Difficult for IAO analyst to get ahold of applicant for clarification – a critical touch point to narrow information - due to missing / inaccurate data	Narrow focus	W	D	s. 13	Service Design	High
2.2	Determine if authorization required	Qualification process for third parties and guardians as a separate step in the application process adds time and delay in determining if applicant has rights to access documents	Determine if they have a right to records	W			Service Design	Medium
2.3	Applicant submits request to IAO intake	The user interface of the online form creates confusion in its navigation, presentation of information, and structure of questions. This requires a follow up to clarify the request.	Submit a request for information	D	A		Service Design	Low

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Illustrative example
See appendix for full process maps and pain point analysis

BRITISH COLUMBIA | Ministry of Children and Family Development

FOI Request Customer Journey Map

AWARENESS		ENTER	ENGAGE		EXIT
Identifies information need	**Researches how to gather information**	**Submits FOI request**	**Receives confirmation and clarifications** The requestor receives confirmation that the request has been received, and may receive a call to clarify or narrow the scope of the request	**Updated on progress** The requestor receives an update on the status of their request, either by proactively reaching out, or receiving notification of deadline extension	**Receives package** The requestor is notified of completion and either receives a digital package, or visits their local MCFD office to collect and speak to an MCFD employee

LINE OF REQUESTOR VISIBILITY

INTERNAL

What's going on behind the scenes?

	Records production & management	Intake	Gather	Scanning / Tagging	Review	Approval & Release
	MCFD documents and files notes, forms, plans, and correspondence in relation to children in care and parents / guardians	IAO processes requests for information submitted via paper or online form	IAO sends call for records to the Ministry to locate physical and digital files	IAO receives, then severs, redacts, scans and tags all files sent by the Ministry	IAO conducts QA of entire package for applicant	IAO approves package and sends to district office for pick up or shares with applicant via SFTS
Systems	LAN (Local Area Network) Physical filing ICM	AXIS Email OneNote	Email Phys. filing RRT SharePoint	AXIS	AXIS OneNote	AXIS Front-line services SFTS
People	MCFD Admin MCFD Social Worker	IAO CFD Personals Analyst	MCFD Admin MCFD DDM Analyst	IAO CFD Personals Scanner	IAO CFD Personals Analyst IAO CFD Personals QA Analyst	IAO CFD Personals QA IAO Citizen Services Desk Staff MCFD District Office Staff
Metrics	Physical filing system has ~135 Attachment types over 9 file types 3.3 M Electronic files created in ICM in 2021	Almost 42% of FOI requests are submitted by paper On average, clarification calls take 15 - 45 minutes	FOI requests comprise ~40% of MCFD's requests for records	Approximately 75% of files require scanning	Analysts average 350 pages per day reviewing documents The average caseload is 26 files per analyst	A 1000-page document takes ~7 days to complete (scan, review, redact) About 26% of files are released via STFS

Pain Points

Records production & management

Practitioners unable to override or update files in ICM is a driver to **poor document management practices** in **duplication of files** (e.g., e-mail, CYSN Support Plan)

ORGANIZATION ENABLEMENT

Administrative staff often cite difficulty communicating policies to practitioners. Working within an hierarchy does not empower administrative staff to **effectively implement and evaluate** filing practices working with positions "above" them, or in a "different office"

ORGANIZATION ENABLEMENT

"There's a **lack of understanding** that if [a file] exists in ICM that it doesn't need to [also] be printed…this has always been a struggle." – MCFD Admin

QUOTE

Intake

Online forms are often **filled out incorrectly or missing information**. The user interface creates confusion in its navigation, presentation of information, and structure of questions. This requires a follow up to clarify the request

SERVICE DESIGN

Applicants continue to fill out **physical forms that are often outdated, leading to missing / inaccurate information**. MCFD offices are one of sources of these outdated forms – they are printed, and rarely pulled from the Intranet site to view updates to the FOI process

SERVICE DESIGN

"Even with the online form, which is great, **people may not understand the forms or miss certain descriptions**." – CFD Personals Analyst

QUOTE

Gather

Qualification process for third parties and guardians **as a separate step in the application process adds time and delay** in determining if applicant has rights to access documents

SERVICE DESIGN

Difficult for IAO analyst to get ahold of applicant for clarification – a **critical touch point to narrow information** - due to **missing / inaccurate data**

SERVICE DESIGN

Not all practitioners have been effectively trained in note-taking and documentation practices, **creating inconsistencies** in files (e.g., still including sticky notes as part of physical file)

ORGANIZATION ENABLEMENT

Scanning / Tagging

Physical files **face sheets lack context / a description** to help IAO analyst determine if a file is responsive to request

CONTENT MANAGMENT

Current queries and lack of subcategories in ICM do not allow MCFD Analyst to **narrow focus** of search for electronic files

CONTENT MANAGMENT

"Even with the types of extension we're allowed, **the process doesn't allow us to meet our timelines**. The time it takes to take the files in and scan them and the time it takes to get the file read three times are the time blockages. ." – CFD Personals Scanner

QUOTE

Review

IAO analysts **often depend on former MCFD staff or social workers** to get context of a file and / or determine if responsive.

ORG. ENABLEMENT

Lack of tracking system for physical documents means they are **delivered to IAO office in a non-sequential order**.

ORG. ENABLEMENT

Knowledge management system isn't regularly updated to train and update IAO staff on reviewing guidelines produces **inconsistencies in approach** and silos in work.

ORG. ENABLEMENT

Approval & Release

District office staff **aren't provided with the training / key messaging to support applicants** when releasing FOI packages. (e.g., why information is missing / redacted, document types, what certain terminologies mean, why decisions were made, etc.)

ORG. ENABLEMENT

"Part of the process involves making sure records get to right people in the district office. In the past **packages have gone missing or ended up in hands of someone who doesn't know what FOI requests are**."– CFD Personals Analyst

QUOTE

01 Organization Enablement

OBSERVATIONS

- “Admin don't feel like they affect much change. They feel like they've been handed a stack of paper. There's a constant rub all the time when we're communicating these changes …what we almost always see is a team leader say, ‘I don't agree with this’ or ‘I wasn't told about this way.’“
- “I can pass on and communicate all I want but I don't have the power to change much.”
- “It’s been challenging to get everyone to use ICM for care plans, case notes, etc. My team are experienced, and a bit set in their ways…we're working on it!”
- “We're a paper-loving ministry and people can't let it go. I was so excited the idea of ICM. But I'd be surprised if we get to being paper-less. There's a fear of letting go the paper.”
- “I think a lot of the weird things that happen are fear-based on losing info. There's a mistrust of tech in the system. I suspect this is one of the root causes of it.”
- “I document everything - I have a black book. Because I'm travelling, I don't have access to physical files. I transcribe everything from my one black book into ICM.

INSIGHTS

- Admin experience difficulties implementing policies and procedures. They do not feel empowered to go against the wishes of practitioners.
- Fear of losing work is a large contributor to duplication of files in ICM. Practitioners have either been advised to duplicate or have personally experienced losing work, influencing their habits to go against best practices.
- District offices differ in their approach to training practitioners, communicating policies, and evaluating best practices, resulting in inconsistencies with regards to note taking, documentation, and sharing information.
- Knowledge management systems lack tracking, evaluation, and compliance components to ensure consistency in policies and procedures
- Difficult to gain a clear understanding on what information can be released through FOI and what MCFD can directly release to the applicant.

IMPLICATIONS

- How might we effectively communicate and implement policy and procedure changes for practitioners?
- How might we ensure note taking and document management is consistently practiced from practitioner to practitioner?
- How might we develop a mechanism for knowledge management to ensure it is up to date and includes evaluation / compliance components?

02 Service Design

OBSERVATIONS

- "[The] people we're engaging with are usually facing numerous barriers (e.g., mental health barriers). So, no matter how much you improve the form, you typically have to engage with the applicant during the process."
- "Even with the online form, which is great, people may not understand the forms or miss certain descriptions, etc. As much as we'd love to go through [applications] super-fast we do often have to reach out and clarify to see if we can narrow the request."
- "The challenge is getting a hold of them and chasing them down. Sometimes we just give up (since people don't answer their phones if they don't know who it is). And then, at the end of the day, you have to move forward and just put together the best thing you can."
- "A lot of people have negative interactions with the Ministry. If it was someone neutral to help them go through it, that would be great. A lot of people don't want to get help from the Ministry, a lot of people interpret it as your bias and you're supporting what the Ministry has done."

INSIGHTS

- Applicants continue to fill out physical forms that are outdated, which doesn't fulfill the information needs of IAO to effectively complete the intake process.
- Online form is difficult to navigate – the user interface guides applicants down an unclear path, information is presented in a confusing manner, applicants are unsure what to ask for.
- Established process not in place to make certain types of documents easily accessible (e.g., Care Plans, identification, decisions)
- Some manual operations are creating inconsistencies in processes and clarity in communications
- Staff manage many manual processes including communication between teams, updating status of application, and contacting applicant

IMPLICATIONS

- How might we empower MCFD staff with accurate and up to date knowledge of the FOI process?
- How might we incorporate service design principles to ensure applicants understand the FOI process, are empowered to make informed decisions, and are provided with support, when required?
- How might we update the FOI intake phase to proactively authorize applicants and narrow their requests?
- How might we make disclosure of certain types of information easily accessible for applicants?
- How might we incorporate service design principles to make the customer journey as easy and accessible as possible?

03 Content Management

OBSERVATIONS

- “There is minimal categorization of attachments within ICM. There's a bit (e.g., ‘Assessment’, ‘Legal’). There are a few things but it's not sufficient to find what you're looking for since you're working with a system and have to keep opening up things to see what it actually is then it's not more convenient than flipping through an actual binder to find things.”
- “But another area where we're seeing this is in email management. The volume of emails are enormous, and we don't have a solution.”
- “I regularly hear of things getting lost, and the help desk can't do anything about it.”
- “In the 2012/13 period, when ICM was new, we had MIS. All we had was paper files, etc. So, moving to this trust to digital / data was tough especially with the early day glitches, etc.”

INSIGHTS

- The current queries and production reports in ICM are not responsive to the needs of DDM staff to locate files.
- Subcategories of attachments in ICM would help staff to narrow requests.
- The face sheets on physical files do not have a description box to help staff determine the context of the file.

IMPLICATIONS

- How might we update ICM search practices to allow DDM staff to effectively search for and locate files responsive to the requests of applicants?
- How might we incorporate subcategories to for more context or specification of files uploaded to ICM?
- How might we update content management structures to allow DDM staff to easily pull demographic information of applicants?
- How might we update content management practices to instill confidence in files and systems, and prevent habits of duplication driven by fear?

Recommendations

Recommendations

Our approach to identifying priority recommendations

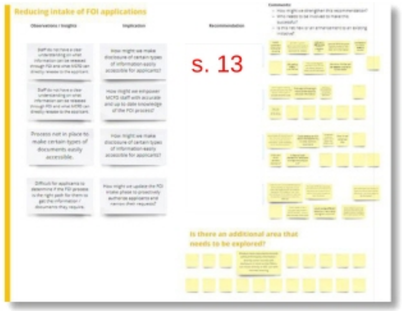
1 Created long-list of potential solutions

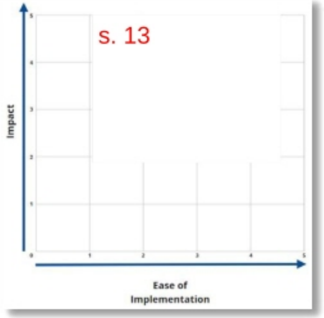
- Firstly, we created a long-list of recommendations by addressing the pain-points uncovered in our research, and using our six levers for improvement as a framework
- **The full list of potential solutions can be found in Appendix 2**

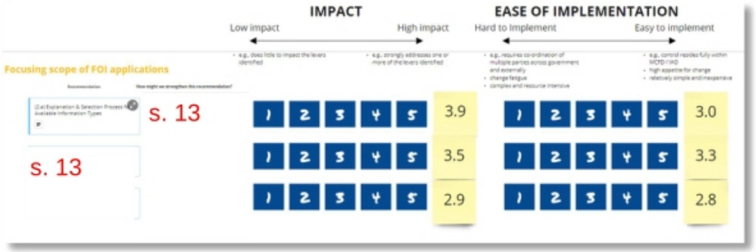
s. 13

2 Assessed and prioritized

- We hosted a workshop with representation from MCFD, IAO and ISD to review the initial list of recommendations, adjusting where necessary, and adding completely new recommendations
- We then conducted a voting exercise based on impact and ease of implementation in order to identify the most impactful recommendations

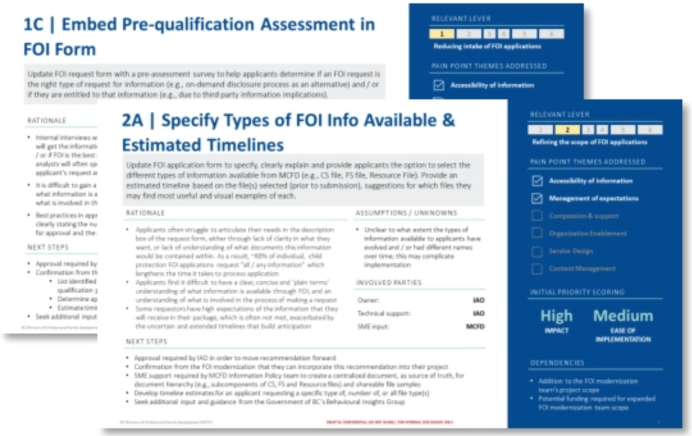






3 Conducted additional research and validation

- We took forward our prioritized recommendations and conducted additional research with relevant stakeholders (Deloitte SMEs and gov experts) to identify owners, involved parties and next steps
- The detailed investigation of each recommendation can be found in the following section



Implementing a mix of priority recommendations from across levers should yield the greatest impact on our problem statement

British Columbia | Ministry of Children and Family Development

PROBLEM STATEMENT

How might MCFD and IAO **sustainably** reduce the **time and effort** to process FOI requests while also gathering and delivering the **information that users / applicants require** in a **time-compliant, accurate, accessible and efficient** manner?

OUTCOMES

- **Reduced Time & Effort to Process FOI Applications** *(MCFD and IAO-focused)*
- **Improved satisfaction with the FOI Experience** *(Applicant-focused)*

DRIVERS

- Number of FOI Applications
- Scope of each FOI Application
- Processing Speed & Effort per FOI Application
- Experience of the end-to-end process
- Contents of the FOI package itself

LEVERS

1. Refining intake of FOI applications
2. Focusing scope of FOI applications
- Faster and more efficient processing of...
  3. ...existing requests
  4. ...future requests
5. Creating a human-centered experience
6. Improving readability of FOI packages

PRIORITY RECOMMENDATIONS

- (1A) s. 13
- (1B)
- (1C) Pre-qualification Assessment
- (2A) Process to Explain & Select Available Information

- (3A s. 13
- (3B) Optimize Workflows between DDM and IAO
- (3C) Streamline Communications with Applicants
- (4A s. 13
  s. 13
- (4C) s. 13
- (4D) s. 13
  s. 13

- (5A) User-friendly Guides & resources
- (5B) s. 13

1A | s. 13

s. 13

RATIONALE

- s. 13
-
-

ASSUMPTIONS / UNKNOWNS

- s. 13

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Info Policy)**
Technical support:	**MCFD (Change Mgmt.)**
SME input:	**MCFD (Info Policy)**
Approval:	**MCFD Executive Committee**

NEXT STEPS

- Requires engagement and approval from MCFD Service Delivery to incorporate into training for social workers and admin, respectively
- s. 13
-

RELEVANT LEVER

1	2	3	4	5	6

Reducing intake of FOI applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] Compassion & support
- [x] **Organization Enablement**
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

Medium	**Medium**
IMPACT	**EFFORT**

DEPENDENCIES

- Training approval
- Change management support

1B | s. 13

s. 13

RATIONALE

- s. 13
-
-

ASSUMPTIONS / UNKNOWNS

- s. 13
-
-

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Info Policy)**
Technical support:	**MCFD (Change Mgmt.), ISD**
SME input:	**IAO**
Approval:	**MCFD Executive Committee**

NEXT STEPS

- Requires engagement and approval from MCFD Service Delivery to incorporate into training for social workers and admin, respectively
- s. 13
-

RELEVANT LEVER

1	2	3	4	5	6

Reducing intake of FOI applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [ ] Management of expectations
- [ ] Compassion & support
- [x] **Organization Enablement**
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

High IMPACT

Medium EFFORT

DEPENDENCIES

- Process creation, training and communication approvals
- Funding required

1C | Embed Pre-qualification Assessment in FOI Form

Update FOI request form with a pre-assessment survey to help applicants determine if an FOI request is the right type of request for information (e.g., on-demand disclosure process as an alternative) and / or if they are entitled to that information (e.g., due to third party information implications).

RATIONALE

- Internal interviews with staff validate that applicants are unsure if they will get the information they require during the application process and / or if FOI is the best process to get information they require. IAO analysts will often spend 15-60 min with applicants to clarify an applicant's request and manage their expectations on their package
- It is difficult to gain a clear, concise and 'plain terms' understanding of what information is available through FOI, and an understanding of what is involved in the process of making a request
- Best practices in approval processes emphasize the importance of clearly stating the number of steps involved in the process, the criteria for approval and the actions that happen as a result of a decision made

ASSUMPTIONS / UNKNOWNS

- N/A

SUGGESTED PARTIES INVOLVED

Owner:	**IAO**
Technical support:	**IAO**
SME input:	**MCFD**

NEXT STEPS

- Approval required by IAO in order to move recommendation forward
- Confirmation from the FOI modernization that they can incorporate this recommendation into their project
    - List identified aspects of the application process that can be moved from internal qualification process to pre-qualification phase
    - Determine approach for testing and implementation
    - Estimate timing to incorporate into roadmap and, if necessary, recommendation's cost
- Seek additional input and guidance from the Government of BC's Behavioural Insights Group

RELEVANT LEVER

1	2	3	4	5	6

Reducing intake of FOI applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] **Compassion & support**
- [ ] **Organization Enablement**
- [x] **Service Design**
- [ ] **Content Management**

INITIAL PRIORITY SCORING

Low	**Medium**
IMPACT	**EFFORT**

DEPENDENCIES

- Addition to the FOI modernization team's project scope
- Potential funding required for expanded FOI modernization team scope

2A | Specify Types of FOI Info Available & Estimated Timelines

Update FOI application form to specify, clearly explain and provide applicants the option to select the different types of information available from MCFD (e.g., CS file, FS file, Resource File). Provide an estimated timeline based on the file(s) selected (prior to submission), suggestions for which files they may find most useful and visual examples of each.

RATIONALE

- Applicants often struggle to articulate their needs in the description box of the request form, either through lack of clarity in what they want, or lack of understanding of what documents this information would be contained within. As a result, ~88% of individual, child protection FOI applications request “all / any information” which lengthens the time it takes to process application
- Applicants find it difficult to have a clear, concise and ‘plain terms’ understanding of what information is available through FOI, and an understanding of what is involved in the process of making a request
- Some requestors have high expectations of the information that they will receive in their package, which is often not met, exacerbated by the uncertain and extended timelines that build anticipation

ASSUMPTIONS / UNKNOWNS

- Unclear to what extent the types of information available to applicants have evolved and / or had different names over time; this may complicate implementation

SUGGESTED PARTIES INVOLVED

Owner:	**IAO**
Technical support:	**IAO**
SME input:	**MCFD**

NEXT STEPS

- Approval required by IAO in order to move recommendation forward
- Confirmation from the FOI modernization that they can incorporate this recommendation into their project
- SME support required by MCFD Information Policy team to create a centralized document, as source of truth, for document hierarchy (e.g., subcomponents of CS, FS and Resource files) and shareable file samples
- Develop timeline estimates for an applicant requesting a specific type of, number of, or all file type(s)
- Seek additional input and guidance from the Government of BC’s Behavioural Insights Group

RELEVANT LEVER

1 | **2** | 3 | 4 | 5 | 6

Refining the scope of FOI applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] Compassion & support
- [ ] Organization Enablement
- [ ] Service Design
- [ ] Content Management

INITIAL PRIORITY SCORING

High IMPACT

Medium EFFORT

DEPENDENCIES

- Addition to the FOI modernization team’s project scope
- Potential funding required for expanded FOI modernization team scope

3A | s. 13

s. 13

RATIONALE

- s. 13
-

ASSUMPTIONS / UNKNOWNS

- N/A

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Info Policy)**
Technical support:	**ISD** **MCFD (Change Mgmt.)**
SME input:	**MCFD (Info Policy)**

NEXT STEPS

- s. 13
-
-

RELEVANT LEVER

1 2 **3** 4 5 6

Faster and more efficient processing of existing requests

PAIN POINT THEMES ADDRESSED

- [ ] Accessibility of information
- [ ] Management of expectations
- [ ] Compassion & support
- [x] **Organization Enablement**
- [ ] Service Design
- [x] **Content Management**

INITIAL PRIORITY SCORING

High IMPACT

Medium EFFORT

DEPENDENCIES

- ISD enhancements and backlog prioritization

3B | Optimize Workflows between DDM & IAO

Reduce the number of emails and steps required for DDM staff to update and share files with IAO analysts by providing them access (i.e., licenses) to IAO's document management system.

RATIONALE

- MCFD DDM Analysts have a number of manual emails and steps in gathering and providing digital documents to IAO (e.g., update status in RRT, send e-mail communication through Outlook, provide Sharepoint link to IAO for documents)
- Having one centralized system will reduce manual processes, room for error, and system touchpoints, ultimately accelerating the time it takes to process existing applications

ASSUMPTIONS / UNKNOWNS

- N/A

SUGGESTED PARTIES INVOLVED

Owner:	**IAO**
Technical support:	**IAO**
SME input:	**IAO, MCFD (Info Policy)**

NEXT STEPS

- Approval required by IAO in order to move recommendation forward
- Coordinate with the FOI Modernization Team to ensure DDM staff have access to new case management system once implemented
- Explore potential interim solutions to resolve DDM pain points until new case management system is implemented (e.g., expand AXIS licenses)

RELEVANT LEVER

1 2 **3** 4 5 6

Faster and more efficient processing of existing applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] Compassion & support
- [ ] Organization Enablement
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

Low	Medium
IMPACT	**EFFORT**

DEPENDENCIES

- Adding to scope of FOI modernization project

3C | Streamline Communications with Applicants

Use automated workflows to provide applicants status updates to save analysts time (who are often managing an average of 20 applications at once that require clarification call reminders and status updates). This may also improve the applicant's overall experience.

RATIONALE

- From our research, FOI applicants often found status updates on the progress of their FOI request inconsistently received
- There is commonly a lack of trust in the government from FOI requestors which can make communications and clarification follow-ups challenging (i.e., not picking up phone calls)
- Some requestors have high expectations of the information that they will receive in their package, which is often not met
- Staff manage many manual processes including updating status of application and contacting applicant

ASSUMPTIONS / UNKNOWNS

- Number of applicants reached compared with those who have not been reached

SUGGESTED PARTIES INVOLVED

Owner:	**IAO**
Technical support:	**IAO**
SME input:	**IAO, ISD**

NEXT STEPS

- Approval required by IAO in order to move recommendation forward
- Coordinate with the FOI Modernization Team to explore ways to implement this feature in the new, soon-to-be-implemented case management system for FOI requests
    - Identify points in customer journey to incorporate structure
    - Determine approach for testing and implementation, timing and (if necessary) costing

RELEVANT LEVER

1 2 **3** 4 5 6

Faster and more efficient processing of existing applications

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] Compassion & support
- [ ] Organization Enablement
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

Medium — IMPACT

Medium — EFFORT

DEPENDENCIES

- Addition to the FOI modernization team's project scope

4A | s. 13

s. 13

RATIONALE

- s. 13
-
-
-
-
-

ASSUMPTIONS / UNKNOWNS

- Existing structure to identify, report and prioritize ICM bugs to ISD for remediation
- Number of tickets raised through ServiceNow, disaggregated to enhancements, bugs, priority

SUGGESTED PARTIES INVOLVED

Owner: **MCFD (Strategic Services)**

Technical support: **MCFD (Change Mgmt.)**
ISD

SME input: **MCFD (Change Mgmt.)**

NEXT STEPS

- Approval required from Strategic Services and Practice to incorporate Change Management services as a regular practice including frameworks, consultation of stakeholders, incorporation of data and evaluation mechanisms
- s. 13
-

RELEVANT LEVER

1 | 2 | 3 | **4** | 5 | 6

Faster and more efficient processing of future requests

PAIN POINT THEMES ADDRESSED

- ☐ Accessibility of information
- ☐ Management of expectations
- ☐ Compassion & support
- ☑ **Organization Enablement**
- ☐ Service Design
- ☑ **Content Management**

INITIAL PRIORITY SCORING

High IMPACT

Medium EFFORT

DEPENDENCIES

- Training approval
- Additional funding potentially required (e.g., FTE resourcing)

4B | s. 13

s. 13

RATIONALE

- s. 13
-
-
-

ASSUMPTIONS / UNKNOWNS

- s. 13

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Learning)**
Technical support:	**MCFD (Change Mgmt.)**
SME input:	**MCFD (Info Policy)**
Approval:	**MCFD Executive Committee**

NEXT STEPS

- Seek approval from MCFD Practice Division and Information Policy to incorporate into training for social workers and admin, respectively
- Develop training materials by first establishing a centralized inventory of current state training materials / docs
- Garner support from Change Management to build engagement to raise awareness and gather feedback

RELEVANT LEVER

1	2	3	**4**	5	6

Faster and more efficient processing of future requests

PAIN POINT THEMES ADDRESSED

- [ ] Accessibility of information
- [ ] Management of expectations
- [ ] Compassion & support
- [x] **Organization Enablement**
- [ ] Service Design
- [x] **Content Management**

INITIAL PRIORITY SCORING

High	High
IMPACT	**EFFORT**

DEPENDENCIES

- Training approval

4C | s. 13

s. 13

RATIONALE

- s. 13
-
-

ASSUMPTIONS / UNKNOWNS

- Trainings available for MCFD staff to learn about FOI

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Learning, Policy)**
Technical support:	**MCFD (Change Mgmt.)**
SME input:	**IAO**
Approval:	**MCFD Executive Committee**

NEXT STEPS

- Seek approvals from Practice and Policy to communicate changes to offices
- s. 13
- Garner support from Change Management to build engagement to raise awareness and gather feedback
- Identify opportunities in Service Delivery and Information Policy to disseminate information

RELEVANT LEVER

1 | 2 | 3 | **4** | 5 | 6

Faster and more efficient processing of future requests

PAIN POINT THEMES ADDRESSED

- [ ] Accessibility of information
- [ ] Management of expectations
- [ ] Compassion & support
- [x] **Organization Enablement**
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

Low	Low
IMPACT	**EFFORT**

DEPENDENCIES

- Change management support
- Project funding potentially required

5A | s. 13

s. 13

RATIONALE

- s. 13
-
-
-

ASSUMPTIONS / UNKNOWNS

- s. 13

SUGGESTED PARTIES INVOLVED

Owner:	**IAO (FOI Modernization)**
Technical support:	**IAO (Business Manager)**
SME input:	**MCFD**
	IAO (Knowledge Management)

NEXT STEPS

- Approval required by IAO in order to move recommendation forward
- s. 13
- Coordinate with the FOI Modernization Team to explore ways to implement this feature (e.g., embed resources in FOI application)

RELEVANT LEVER

1 | 2 | 3 | 4 | **5** | 6

Creating a human-centered experience

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [x] **Management of expectations**
- [ ] Compassion & support
- [ ] Organization Enablement
- [x] **Service Design**
- [ ] Content Management

INITIAL PRIORITY SCORING

High IMPACT

Low EFFORT

DEPENDENCIES

- Project funding potentially required

5B | s. 13

s. 13

RATIONALE

- s. 13
-
-
-

ASSUMPTIONS / UNKNOWNS

- Training and communication channels available to disseminate information

SUGGESTED PARTIES INVOLVED

Owner:	**MCFD (Learning)**
Technical support:	**MCFD (Change Mgmt.)**
SME input:	**IAO**
Approval:	**MCFD Executive Committee**

NEXT STEPS

- Requires approval from MCFD Practice Division and Information Policy to incorporate into training for social workers and admin, respectively
- s. 13
- Determine best channels and training opportunities to disseminate information to front-line MCFD staff

RELEVANT LEVER

1 | 2 | 3 | 4 | **5** | 6

Creating a human-centered experience

PAIN POINT THEMES ADDRESSED

- [x] **Accessibility of information**
- [ ] Management of expectations
- [ ] Compassion & support
- [x] **Organization Enablement**
- [ ] Service Design
- [ ] Content Management

INITIAL PRIORITY SCORING

High IMPACT

Medium EFFORT

DEPENDENCIES

- Training approval
- Change management support

We prioritized the recommendations in dark blue from a longer list of potential solutions

Ministry of Children and Family Development

1 Reducing intake of FOI applications

Dark blue text indicates prioritized solutions

a. s. 13

b.

c. **Embed Pre-qualification Assessment in FOI Form:** Update FOI request form with a pre-assessment to help applicants determine if an FOI request is the right type of request for information and / or if they are entitled to that information.

d s. 13

e

2 Focusing scope of FOI application

a. **Specify Types of FOI Info Available & Estimated Timelines:** Update FOI application form to specify, clearly explain and provide applicants the option to select the different types of information available from MCFD (e.g., CS file, FS file, Resource File). Provide an estimated timeline based on the file(s) selected (prior to submission), suggestions for which files they may find most useful and visual examples of each.

b. s. 13

We prioritized the recommendations in dark blue from a longer list of potential solutions

Ministry of Children and Family Development

3

Faster and more efficient processing of the existing backlog

Dark blue text indicates prioritized solutions

a. s. 13

b. **Optimize Workflows between DDM & IAO:** Reduce the number of emails and steps required for DDM staff to update and share files with IAO analysts by providing them access (i.e., licenses) to IAO's document management system.

c. **Streamline Communications with Applicants:** Use automated workflows to provide applicants status updates to save analysts time (who are often managing an average of 20 applications at once that require clarification call reminders and status updates). This may also improve the applicant's overall experience.

d. s. 13

e.

f.

g.

We prioritized the recommendations in dark blue from a longer list of potential solutions

Ministry of Children and Family Development

4

Faster and more efficient processing of future requests

Dark blue text indicates prioritized solutions

a. s. 13

b.

c.

d.

e.

We prioritized the recommendations in dark blue from a longer list of potential solutions

BRITISH COLUMBIA | Ministry of Children and Family Development

5

Creating a human-centered experience

Dark blue text indicates prioritized solutions

a. **User Friendly Guides & Resources:** Develop guides and resources to assist applicants through the FOI process (i.e., embed an approachable video [in the FOI form] walking applicants through the application's process)

b. s. 13

c.

d.

e.

f.

g.

h.

We prioritized the recommendations in dark blue from a longer list of potential solutions

Ministry of Children and Family Development

6

s. 13

Dark blue text indicates prioritized solutions

a s. 13

b

c

Metrics & Potential Impact

Ministry of Children and Family Development

Summary of the potential impact of our recommendations (steady-state)

A highly preliminary analysis of the potential impact of each recommendation (once implemented), suggests that MCFD and IAO **could save a total of** s. 13 s. 13 **working days[1] per year** (steady-state[2]), which **equates to the work done by** s. 13 **FTEs[3] each year** (which can process s. 13 **FOIs each year[4]**).

Lever	Recommendation	Number of days saved (Conservative vs. Aggressive Estimates)	Impact by Lever
1 **Refining intake of FOI applications**	(1A) s. 13 (1B) (1C) Pre-qualification Assessment	s. 13	
2 **Focusing scope of FOI applications**	(2A) Process to Explain & Select Available Information		
3 **Faster and more efficient processing of existing requests**	(3A s. 13 (3B) Optimize Workflows between DDM & IAO (3C) Streamline Communications with Applicants		
4 **Faster and more efficient processing of future requests**	(4A) s. 13 s. 13 (4B) s. 13 (4C)		

Total FTE workload saved per year:

s. 13 **FTEs[3] per year**

(equates to processing s. 13 FOIs per year[4])

Notes: (1.) Working Days is calculated based on the estimated number of productive work hours per FTE per day (i.e., 6); (2.) This analysis uses 2019-21 MCFD FOI data as its baseline and assumes that all recommendations are implemented and benefits are realized simultaneously; overlapping benefits are not accounted for; (3.) FTE workload calculation is based on the estimated number of working days per FTE per annum (i.e., 230); (4.) Calculated by dividing the average number of FOIs processed between 2019-20 by the number of staff (across MCFD and IAO) that process MCFD FOI-related requests. (*) Due to each recommendation sharing a KPI metric, our analysis was unable to disaggregate the singular impact each one of these recommendations would have.

Metrics & Potential Impact

British Columbia | Ministry of Children and Family Development

Summary of the potential impact of our recommendations (steady-state)

A highly preliminary analysis of the potential impact of each recommendation (once implemented), suggests that MCFD and IAO **could save a total of** s. 13 s. 13 **working days[1] per year** (steady-state[2]), which **equates to the work done by** s. 13 **FTEs[3] each year** (which can process s. 13 **FOIs each year[4]**).

Potential Annual Savings (in Working Days) by Recommendation(s)

s. 13

MCFD & IAO[5]
MCFD
IAO
Aggressive Estimate
11 Aggressive Estimate
8 Conservative Estimate

Recommendations	1A+1B*	1C	2A	3A	3B	3C	4A+4B*	4C	**TOTAL**

Levers

1 Refining intake of FOI applications

s. 13 *days saved*

- (1A) s. 13
- (1B) s. 13
- (1C) Pre-qualification Assessment

2 Focusing scope of FOI applications

s. 13 *days saved*

- (2A) Process to Explain & Select Available Information

3 Faster and more efficient processing of existing requests

s. 13 *days saved*

- (3A) ICM Updates to Improve File Gathering
- (3B) s. 13
- (3C)

4 Faster and more efficient processing of future requests

s. 13 *days saved*

- (4A) s. 13

s. 13

- (4B) s. 13
- (4C) s. 13

s. 13

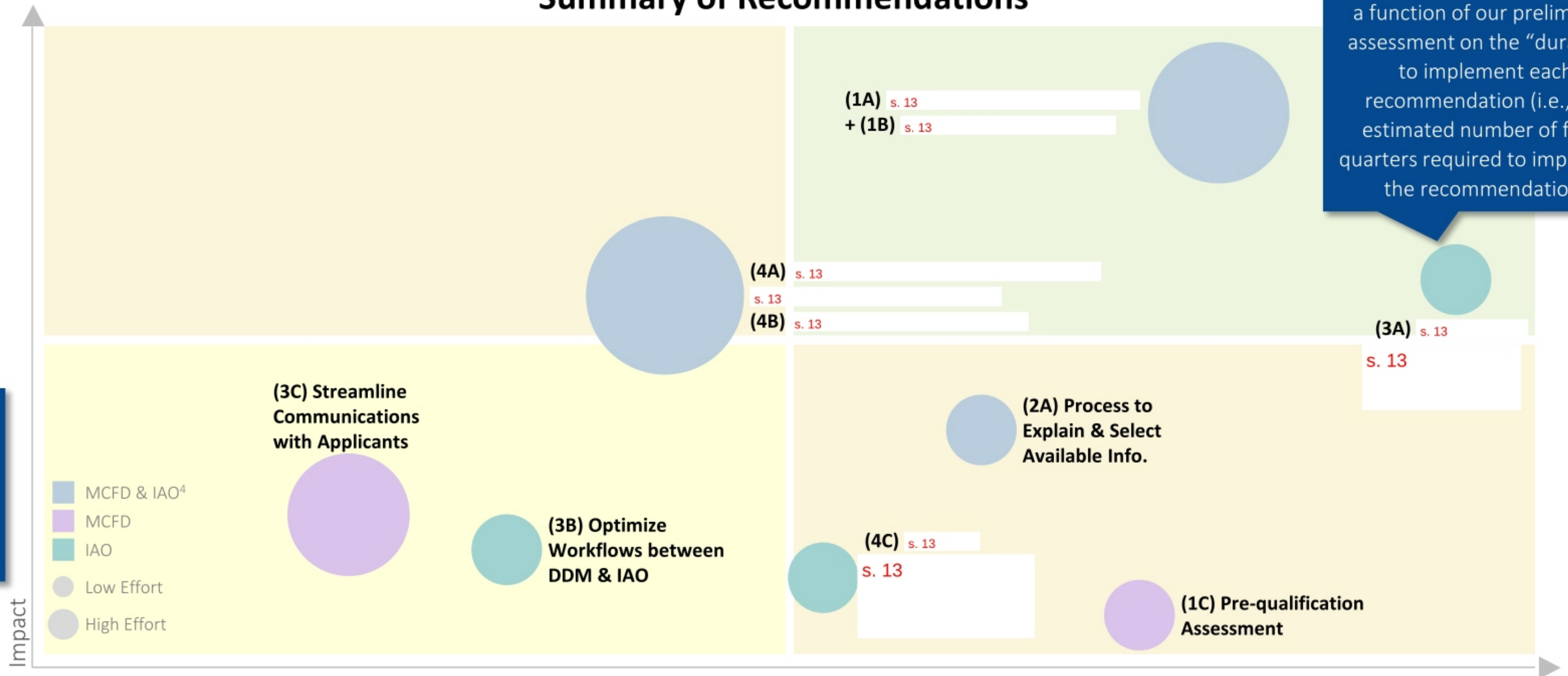
Notes: (1.) Working Days is calculated based on the estimated number of productive work hours per FTE per day (i.e., 6); (2.) This analysis uses 2019-21 MCFD FOI data as its baseline and assumes that all recommendations are implemented and benefits are realized simultaneously; overlapping benefits are not accounted for; (3.) FTE workload calculation is based on the estimated number of working days per FTE per annum (i.e., 230); (4.) Calculated by dividing the average number of FOIs processed between 2019-20 by the number of staff (across MCFD and IAO) that process MCFD FOI-related requests; (5.) Impact classified as "MCFD & IAO" suggests that it was not possible in our analysis to disaggregate the direct impact that would be have for either MCFD or IAO. (*) Due to each recommendation sharing a KPI metric, our analysis was unable to disaggregate the singular impact each one of these recommendations would have.

Summary of the potential impact, priority and effort of our recommendations (steady-state)

Ministry of Children and Family Development

A highly preliminary analysis of the potential impact of each recommendation (once implemented), suggests that MCFD and IAO **could save a total of** s. 13 s. 13 **working days[1] per year** (steady-state[2]), which **equates to the work done by** s. 13 **FTEs[3] each year** (which can process s. 13 **FOIs each year**).

Summary of Recommendations



Effort (the size of the bubble) is a function of our preliminary assessment on the "duration" to implement each recommendation (i.e., the estimated number of fiscal quarters required to implement the recommendation)

Impact measures the number of (steady-state) working days saved once the recommendation is implemented

Priority reflects the proposed sequencing of priority recommendations and the degree of direct and indirect dependencies on one another

Notes: (*) Due to each recommendation sharing a KPI metric, our analysis was unable to disaggregate the singular impact each one of these recommendations would have.

Metrics & Potential Impact

Identification and tracking of primary metrics is critical to measuring the success of initiatives

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LEVER	PRIMARY METRIC	RATIONALE
1 **Refining intake of FOI applications**	**Number of applications**	The recommendations below work to reduce the number of applications submitted by increasing awareness of alternative disclosure processes that take less time. They also incorporate behavioural nudging of the user through a pre-qualification assessment to determine if the FOI process is appropriate for their request, while keeping in mind all users have a legislative right to this avenue. These all will contribute to an intake decrease.

ASSOCIATED RECOMMENDATIONS

	Recommendation	Potential Metrics	Rationale	Potential Annual Saving (working days)	Core Assumptions
1A.	s. 13				
1B.					
1C.	**Embed Pre-qualification Assessment in FOI Form**	*Primary metric:* Number of FOI application classified as "disqualified" Number of on-demand disclosures	Providing applicants with the knowledge to confidently determine if an FOI application is the appropriate avenue to make a request for information will optimize the intake process. The assessment will continue to remain cognizant of a applicant's legislative right to information. Implementation of this recommendation will impact the number of applications submitted.	s. 13	s. 13

Note: A comprehensive explanation of assumptions and calculations can be found in the supporting Excel document - 'Potential Impact of Recommendations'

Identification and tracking of primary metrics is critical to measuring the success of initiatives

British Columbia | Ministry of Children and Family Development

LEVER	PRIMARY METRIC	RATIONALE
2 **Focusing scope of FOI applications**	**Pages per application**	The recommendation below works to narrow the scope of applications submitted. Focusing the scope will allow users to make well-informed decisions about the types of information that will fulfill their information needs.

ASSOCIATED RECOMMENDATIONS

Recommendation	Potential Metrics	Rationale	Potential Annual Saving (working days)	Core Assumptions
2A. Specify Types of FOI Info Available & Estimated Timelines	*Primary metric:* Average page per processed FOI application Number of applications requesting "all / any information"	Providing applicants with information to clearly explain attachment and file types related to their information request will encourage a narrowing of scope for FOI packages. This, in turn will allow MCFD staff to gather specific files, which will therefore have an impact on the average page count of FOI packages.	s. 13	s. 13
	Disaggregated data for attachment types requested	Because applicants are able to clearly articulate their asks through a menu of options, ministries can further disaggregate their data to determine trends in the types of requests for information made, rather than relying on anecdotal evidence to make data-informed decisions.		

Note: A comprehensive explanation of assumptions and calculations can be found in the supporting Excel document - 'Potential Impact of Recommendations'

Identification and tracking of primary metrics is critical to measuring the success of initiatives

Ministry of Children and Family Development

LEVER	PRIMARY METRIC	RATIONALE
3 **Faster and more efficient processing of existing requests**	**Processing time per application**	The recommendations below work to elevate processes and work aids to improve efficiency and effectiveness of time spent gathering information. Improving workflows, search queries, training, and communication will ensure consistency in the implementation of policies, therefore reducing error and deviation that results in time wastes to process applications.

ASSOCIATED RECOMMENDATIONS

	Recommendation	Potential Metrics	Rationale	Potential Annual Saving (working days)	Core Assumptions
3A.	s. 13				
3B.	**Optimize Workflows between DDM & IAO**	Average days spent by DDM analysts gathering files per FOI application	Communication times between IAO and DDM are dependent on the accuracy of information and the channels used to clarify requests. Optimizing workflows will have an impact on communication times and, as a result, gathering	s. 13	
3C.	**Streamline Communications with Applicants**	Average clarification call time of IAO Analysts with applicants Average days spent during intake phase of application (Day received by MCFD – Day application received)	Clarification and status calls to inform applicants of status of request comprise a large part of the scanning and review phases. Incorporating triggers and automation, along with improving communication methods will have an impact on days spent during intake phase and time spent on clarification calls		

Note: A comprehensive explanation of assumptions and calculations can be found in the supporting Excel document - 'Potential Impact of Recommendations'

Identification and tracking of primary metrics is critical to measuring the success of initiatives

British Columbia | Ministry of Children and Family Development

LEVER	PRIMARY METRIC	RATIONALE
4 **Faster and more efficient processing of future requests**	**Processing time per application**	The recommendations below work to elevate processes and work aids to improve efficiency and effectiveness of time spent gathering information. Improving workflows, search queries, training, and communication will ensure consistency in the implementation of policies, therefore reducing error and deviation that results in time wastes to process applications.

ASSOCIATED RECOMMENDATIONS

Recommendation	Potential Metrics	Rationale	Potential Annual Saving (working days)	Core Assumptions
4A s. 13				
4B				
4C				

Note: A comprehensive explanation of assumptions and calculations can be found in the supporting Excel document - 'Potential Impact of Recommendations'

Identification and tracking of primary metrics is critical to measuring the success of initiatives

British Columbia | Ministry of Children and Family Development

LEVER	PRIMARY METRIC	RATIONALE
5 6 **Creating a <u>human-centered experience &</u> Improving readability of FOI packages**	**Customer Satisfaction Score (CSAT)**	The recommendations below work to create a feedback loop around the impact and effectiveness of services provided. A well-structured customer satisfaction score will provide ministries with direct, timely feedback from applicants. Rather than relying on anecdotal evidence that can tend to be dated and static, this structure will help ministries to make dynamic, data-informed decisions about service delivery.

ASSOCIATED RECOMMENDATIONS

Recommendation	Potential Metrics	Rationale
5A. User-Friendly Guides & Resources	Average time spent by IAO analysts on follow-up communication with applicants	Providing applicants with the knowledge to confidently determine if an FOI application is the appropriate avenue to make a request for information will optimize the intake process. The assessment will continue to remain cognizant of a applicant's legislative right to information
	Average number of follow-up interaction IAO analysts have with FOI applicants	Customer experiences best practices show a direct correlation between the number of interactions with an applicant and the client satisfaction score – as the interactions increase, the score decreases. Fewer interactions that require less clarification will demonstrate a client satisfied with their experience
	Number of online authentications through FOI form	Providing a clear, accessible explanation of how applicants are able to authenticate their identity will be reflected in the number of applicants who authenticate with their BCID through the online form
5B. s. 13		

Appendix

Appendix 1

Pain Points and Process Maps

The chevrons below are links to provide in-depth process maps for each phase

Intake

Adobe Acrobat Document

Gather

Adobe Acrobat Document

Scanning / Tagging

Adobe Acrobat Document

Review

Approval & Release

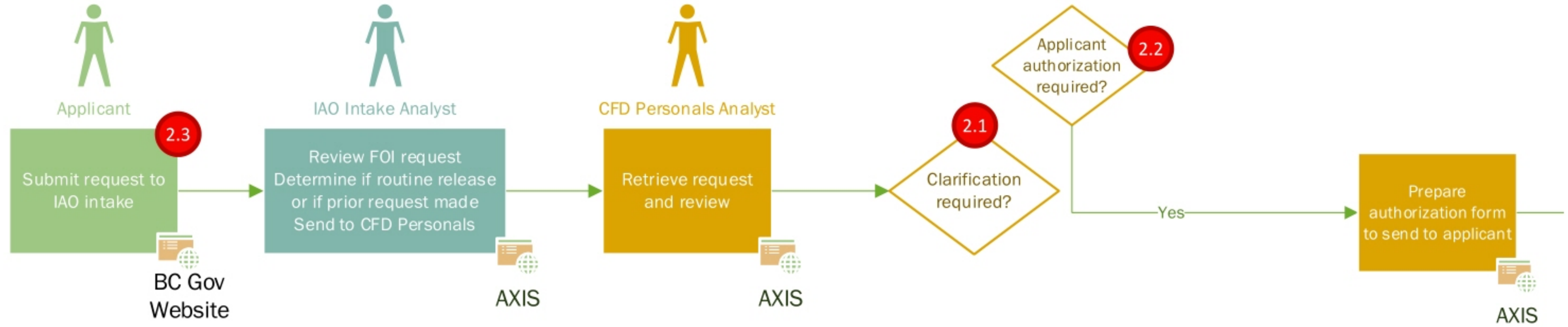
Adobe Acrobat Document

Impact
- High
- Medium
- Low

Appendix 1 | Process Map Pain Points Analysis

Intake

CURRENT PROCESS



Pain Point Types

W – Waiting (for information, approvals)

A – Absent information (missing, skipped, not visible)

S – Systems (don't have interface, don't have definitions)

T – Too many cooks (too many approvers, need to consult)

E – Excess work, materials, redoing, re-entering, duplication

D – Defects (inaccurate information, change orders, doesn't meet customer expectations)

ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
2.1	Determine if clarification required	Difficult for IAO analyst to get ahold of applicant for clarification – a critical touch point to narrow information - due to missing / inaccurate data	Narrow focus	W	D	s. 13	Service Design	High
2.2	Determine if authorization required	Qualification process for third parties and guardians as a separate step in the application process adds time and delay in determining if applicant has rights to access documents	Determine if they have a right to records	W			Service Design	Medium
2.3	Applicant submits request to IAO intake	The user interface of the online form creates confusion in its navigation, presentation of information, and structure of questions. This requires a follow up to clarify the request.	Submit a request for information	D	A		Service Design	Low

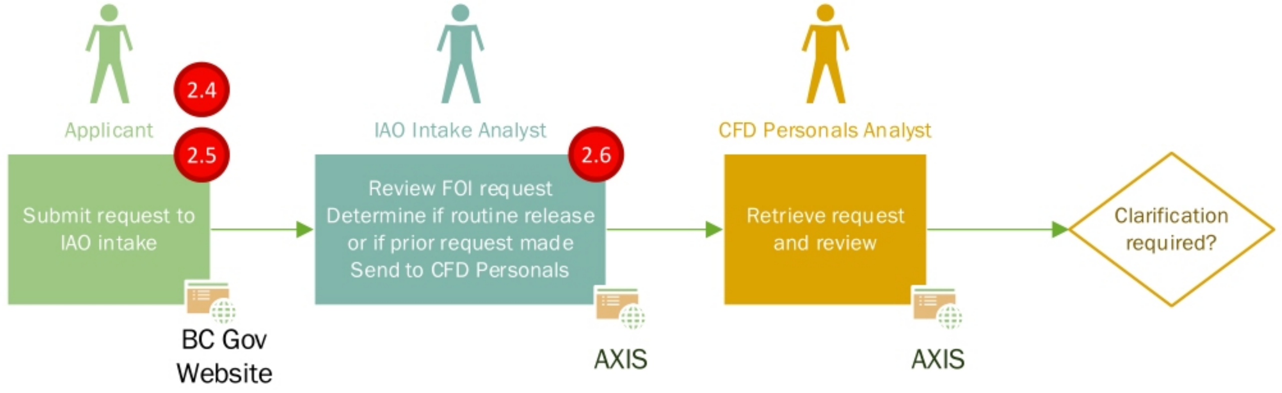
Appendix 1 | Process Map Pain Points Analysis

Intake

Impact
- High
- Medium
- Low

Ministry of Children and Family Development

CURRENT PROCESS



Pain Point Types

W – Waiting (for information, approvals)

A – Absent information (missing, skipped, not visible)

S – Systems (don't have interface, don't have definitions)

T – Too many cooks (too many approvers, need to consult)

E – Excess work, materials, redoing, re-entering, duplication

D – Defects (inaccurate information, change orders, doesn't meet customer expectations)

ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
2.4	Applicant submits request to IAO intake	Forms are often filled out incorrectly or missing information, triggering the need for clarification call.	Obtain accurate information and clear request	D	A	s. 13	Service Design	High
2.5	Applicant submits request to IAO intake	Applicants continue to fill out physical forms that are often outdated, leading to missing / inaccurate information. MCFD offices are one of sources of these outdated forms – they are printed, and rarely pulled from the Intranet site to view updates to the FOI process	Obtain accurate information and clear request	D	A		Organization Enablement	Medium
2.6	CFD Intake creates request in AXIS	Manual tracking and updating of status of application places responsibility on analyst to develop own scheduling and reminder system, creating inconsistencies and room for human error	Clarity between offices on status of request, through phases	S	E		Organization Enablement	Medium

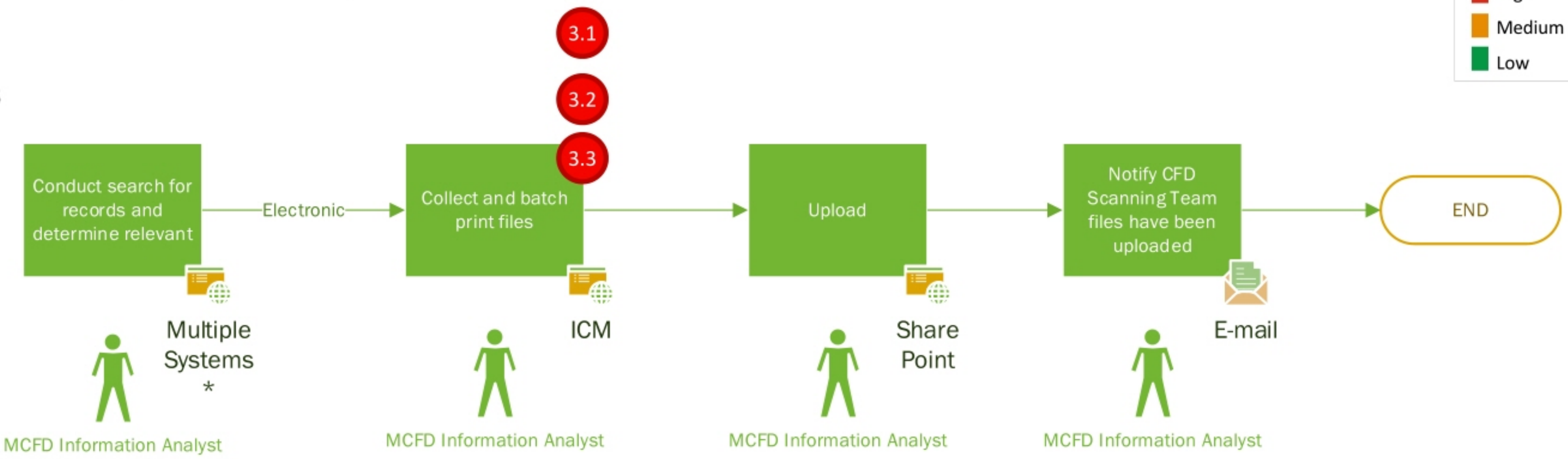
Appendix 1 | Process Map Pain Points Analysis

Gather

Impact
- High
- Medium
- Low

Ministry of Children and Family Development

CURRENT PROCESS



Pain Point Types

W – Waiting (for information, approvals)

A – Absent information (missing, skipped, not visible)

S – Systems (don't have interface, don't have definitions)

T – Too many cooks (too many approvers, need to consult)

E – Excess work, materials, redoing, re-entering, duplication

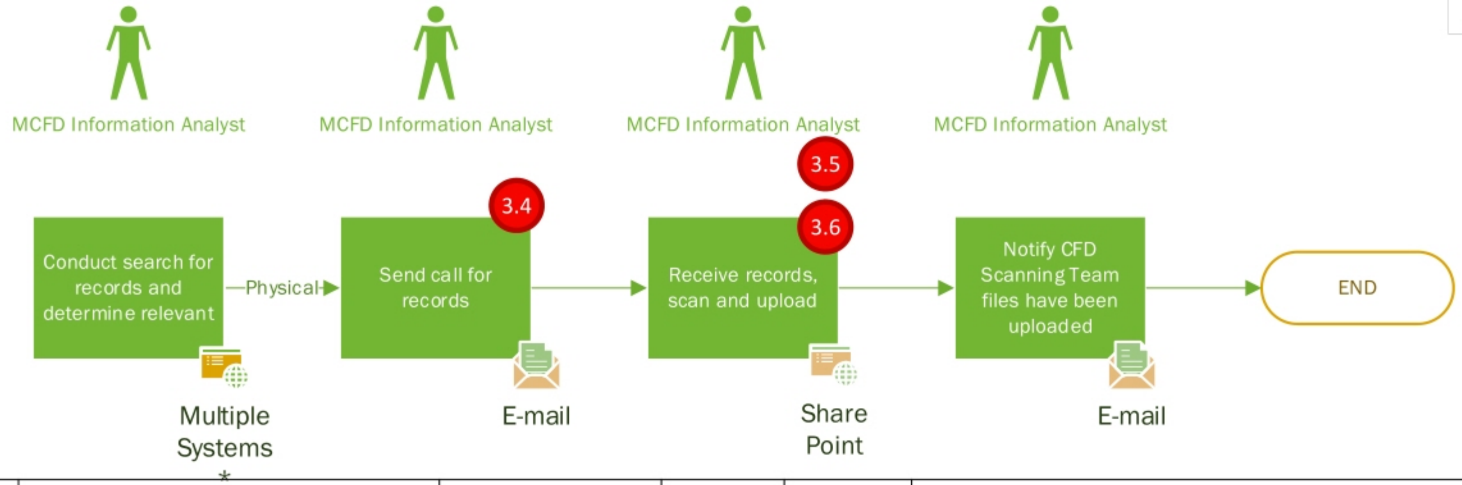
D – Defects (inaccurate information, change orders, doesn't meet customer expectations)

ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
3.1	Collect and batch print files	Files aren't clearly marked/categorized; current categorization practices do not provide enough information to narrow focus	Narrow focus of files when searching in ICM	A		s. 13	Content Management	High
3.2	Collect and batch print files	ICM production is time consuming - have to go in to attachments of attachments (e.g. file with 200 attachments); Lack of content management system	Clearly know what is in each file	E			Content Management	High
3.3	Collect and batch print files	ICM search times are long; lack a proper search engine for index cards	Locate files associated with requestor	W			Content Management	High

Appendix 1 | Process Map Pain Points Analysis

Gather

CURRENT PROCESS



Impact
- High
- Medium
- Low

Ministry of Children and Family Development

Pain Point Types

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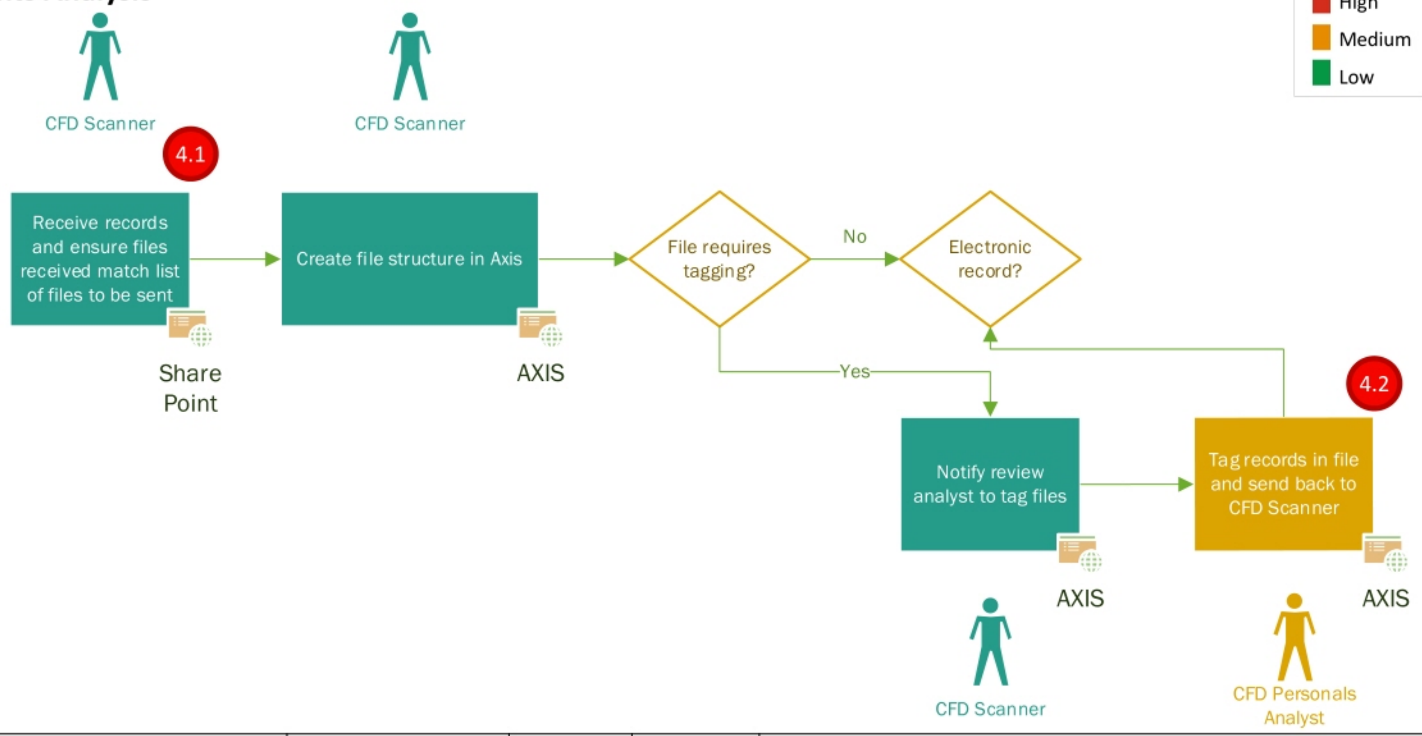
ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
3.4	Send call for records	Unable to determine if office received request or at what stage they are in gathering records	Clarity between offices on status of request	A		**Optimize Workflows between DDM & IAO:** Reduce the number of emails and steps required for DDM staff to update and share files with IAO analysts by providing them access (i.e., licenses) to IAO's document management system.	Organization Enablement	Low
3.5	Receive records, scan and upload	Physical files aren't organized in a format that is easy to process	Understand contents of boxes	W		s. 13	Organization Enablement	High
3.6	Receive records, scan and upload	Physical file descriptions do not provide enough context to determine if a file is responsive or not	Understand contents of boxes	D			Organization Enablement	High

Appendix 1 | Process Map Pain Points Analysis

Scanning / Tagging

CURRENT PROCESS



Impact

- High
- Medium
- Low

Pain Point Types

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E – Excess work, materials, redoing, re-entering, duplication

D – Defects (inaccurate information, change orders, doesn't meet customer expectations)

ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
4.1	Receive records and ensure files received match list of files to be sent	Information provided in random order; not by date - analysts have to develop own tracking system	Clear chronology on files	D		s. 13	Organization Enablement	High
4.2	Tag records and send back to CFD Scanner	Multiple copies of the same incident, analysts will often look at the date, rather than the record/uploading date	One source of truth for each file type	E			Organization Enablement	High

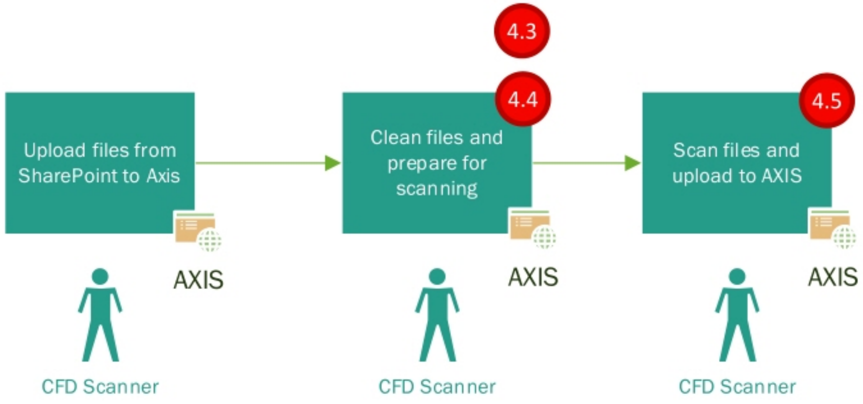
Appendix 1 | Process Map Pain Points Analysis

Scanning / Tagging

CURRENT PROCESS

Impact
- High
- Medium
- Low

Ministry of Children and Family Development



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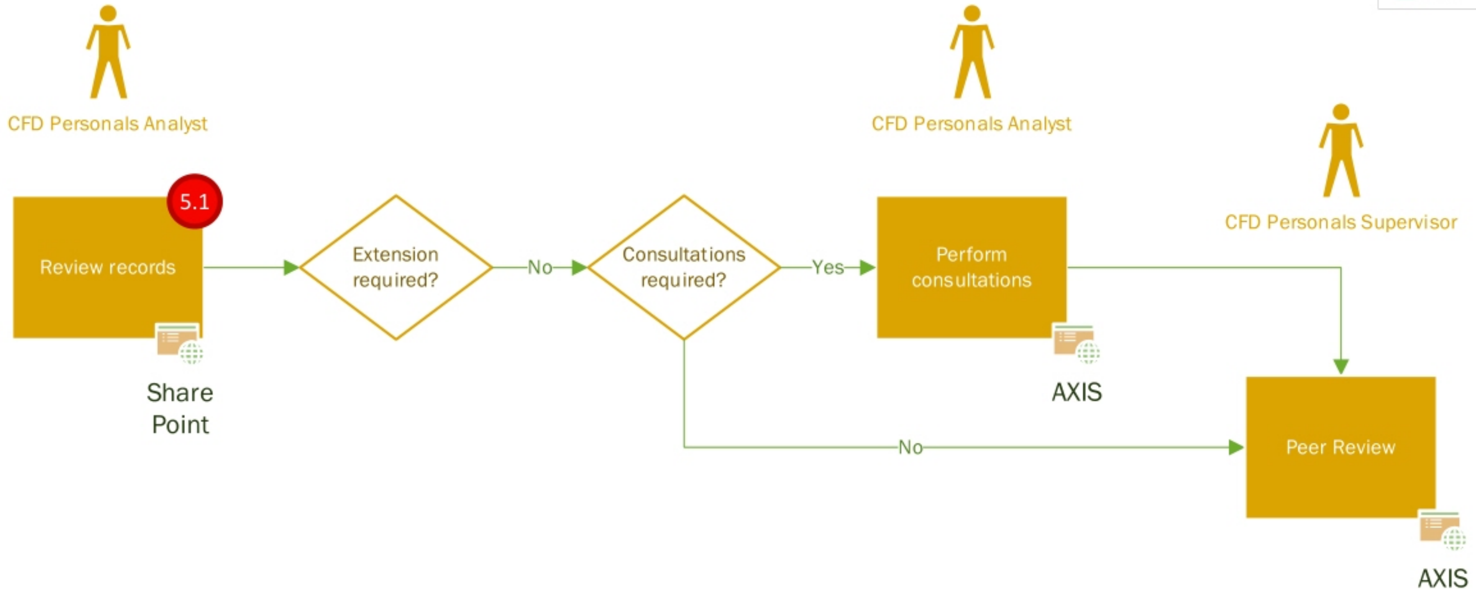
ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
4.3	Clean files and prepare for scanning	Hard to differentiate between what is harmful to relase and what isn't; often rely on MCFD, who relies on social workers. IAO will sometimes reach out to the social worker mentioned (if still working) to determine.	Clarity on what to release and what not to release	4.3	A	s. 13	Organization Enablement	Medium
4.4	Clean files and prepare for scanning	More training required on MCFD for IAO staff in addition to FOIPPA in order to understand files and context; long review times	Determine if applicant actually requires information	4.4	A		Organization Enablement	Medium
4.5	Scan files and upload to AXIS	Records aren't scanned on time due to volume of request	Meet legislated timelines	4.5	D		Organization Enablement	High

Appendix 1 | Process Map Pain Points Analysis

Review

CURRENT PROCESS

Impact
- High
- Medium
- Low



Pain Point Types

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ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
5.1	Review records	Guidelines on reviewing, but each analyst develops their own unique approach	Confidently and consistently determine rules for redaction and review	D		s. 13	Organization Enablement	Medium

Appendix 1 | Process Map Pain Points Analysis

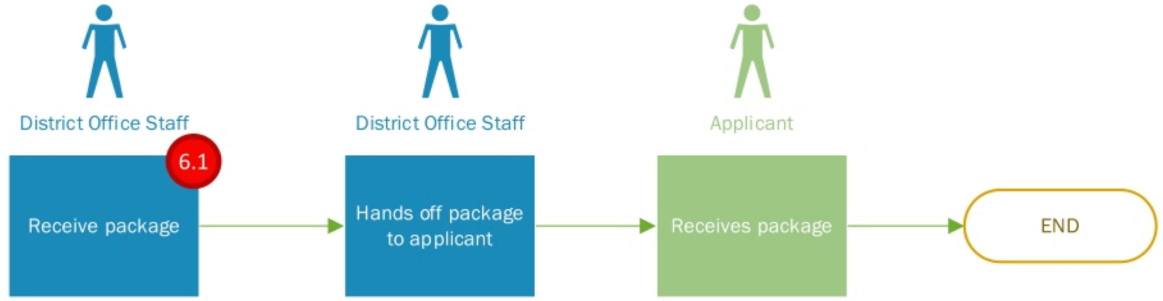
Release

Impact

- High
- Medium
- Low

Ministry of Children and Family Development

CURRENT PROCESS



Pain Point Types

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E – Excess work, materials, redoing, re-entering, duplication

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ID	Step	Pain Point	Goal	Pain Point Type	Secondary Pain Point Type (if applic.)	Recommendation	Theme	Impact
6.1	District office staff receives package	District office staff are sometimes not the best people to release FOI packages because of their limited interaction with the process.	Clear messaging for applicant so they know what is in the package, who to contact	D		s. 13	Organization Enablement	Medium

BRITISH COLUMBIA

Ministry of Children and Family Development

RECORDS RELEASED IN RESPONSE TO A FREEDOM OF INFORMATION (FOI) REQUEST

DIRECTIVE RESPECTING RECORDS AVAILABLE TO THE PUBLIC WITHOUT A REQUEST UNDER THE FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

DIRECTIVE:	06-2016
SUBJECT:	**Disclosure of Records Released in Response to a Freedom of Information (FOI) Request**
AUTHORITY:	This directive is issued under section 71.1 of the *Freedom of Information and Protection of Privacy Act*.
APPLICATION:	This directive applies to all Ministries.
EFFECTIVE DATE:	May 30, 2016

Minister of Finance

Directive to all Ministries issued under section 71.1 of the *Freedom of Information and Protection of Privacy Act*

Under section 71.1 (1) of the *Freedom of Information and Protection of Privacy Act*, R.S.B.C. 1996, c.165 (FOIPPA), I, Michael de Jong, Q.C., Minister of Finance, establish the following as a category of records that is available to the public without a request under that Act:

Records released as responsive to an FOI Request, where an FOI Request is a request made under FOIPPA for access to a record, excluding the following:

- **Records released in response to a personal information request (which is a request made by an individual or their representative for access to their own personal information); or**
- **Records exempted from disclosure based on one or more of the attached exemption criteria.**

Under section 71.1 (4) and (5) of FOIPPA, these records must contain the following information and must be disclosed in the manner and by the timelines set out below:

1) Records released as responsive to an FOI Request must be posted with a copy of the response letter to the applicant, subject to the redaction of any personal information in the response letter which if disclosed would constitute an unreasonable invasion of an individual's privacy.

2) The responsive records and the response letter must be posted to the Open Information website no sooner than 5 business days after their release to the applicant.

This Directive is effective as of May 30, 2016.

June 7, 2016
Date

Minister of Finance

EXEMPTION CRITERIA FOR DIRECTIVE 06-2016

Records released as responsive to an FOI Request may be exempted from disclosure on the Open Information website, either in whole or in part, if they contain any of the following:

a) Personal information, if the disclosure would constitute an unreasonable invasion of an individual's privacy;

b) Information that may harm relations with a First Nation;

c) Information that may harm relations with another government;

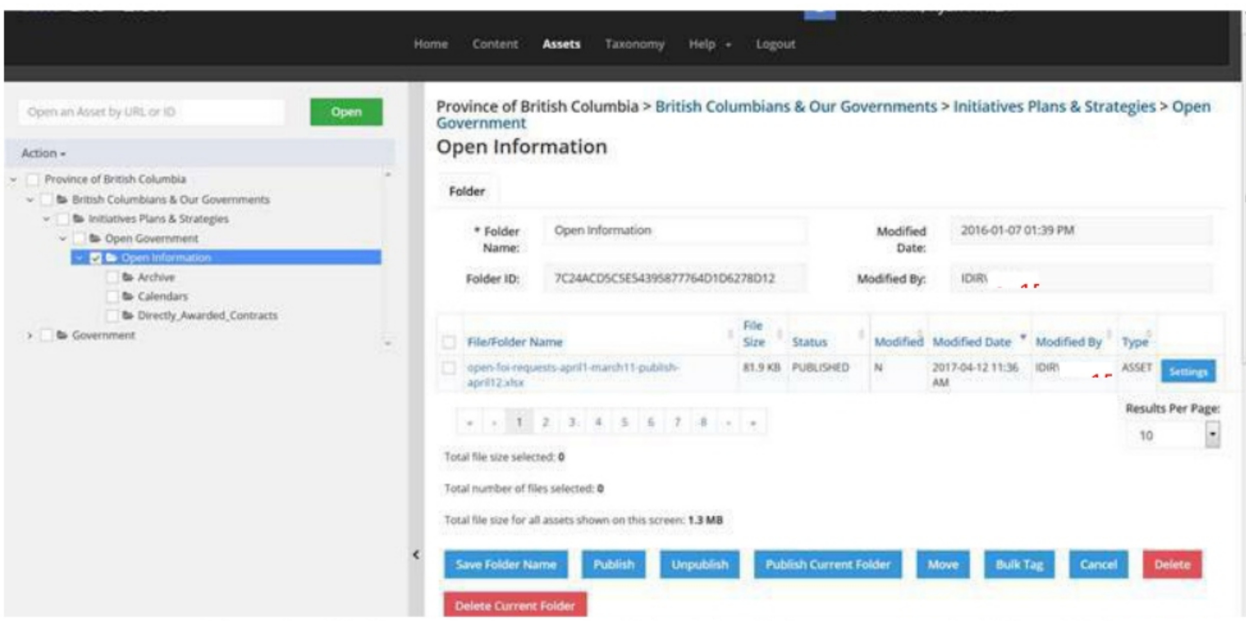
d) Information that may harm a third party's business interests;

e) Information that may threaten the safety of a person or harm the security of any property or system; or

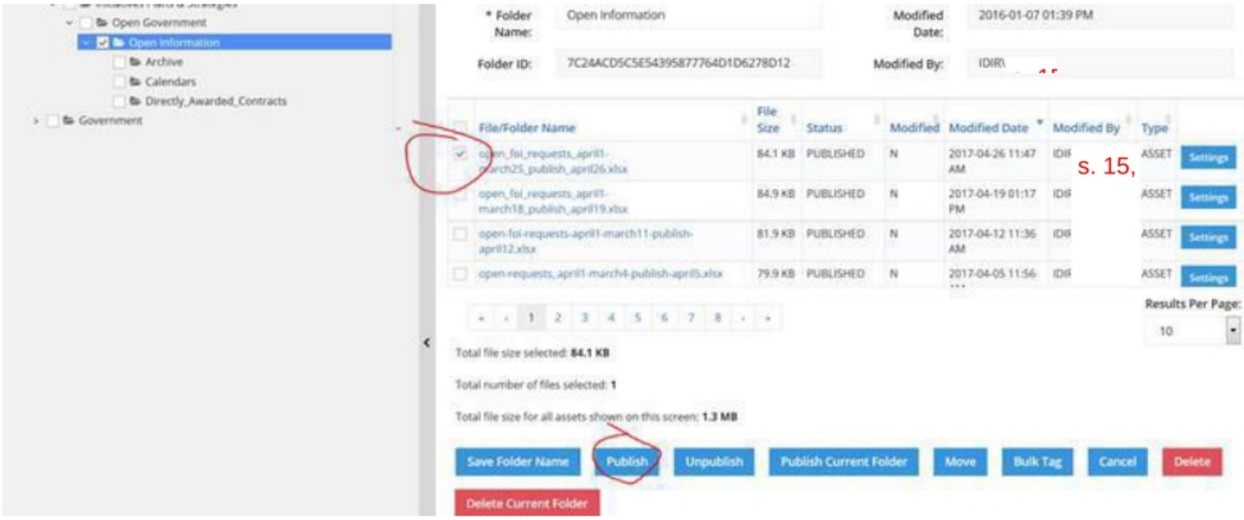
f) Information which should not be disclosed on the Open Information website for other legal or compelling public interest reasons.

Publication Process
NOTE: Team is currently reviewing processes so these may change in the future.
February 2, 2022
14:37

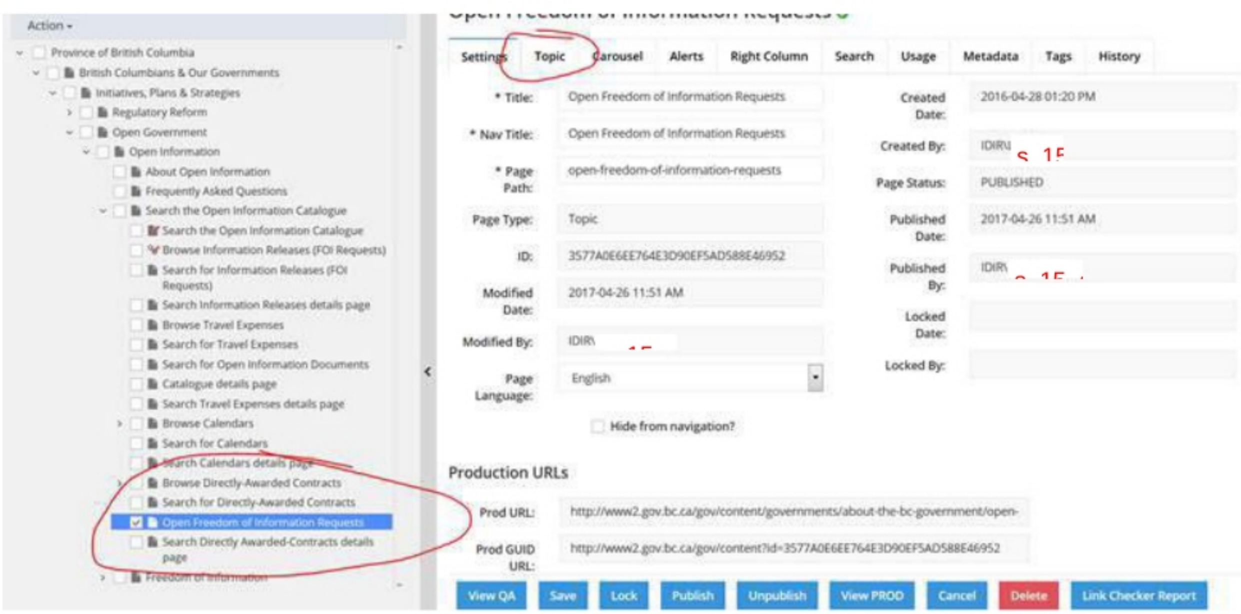
- ASD Contracts are Published to OI via CMS Lite
  - Licence holders are:
  - Ann-Marie
  - Jennifer Peddle
- Current Process:
  - Check the ASD folder to ensure the previous version has been saved
    - [K:\Open Information\1. Proactive Release\Alternative Service Delivery Contracts\Previous FY Reports]()
    - If not found, save the currently online version to this folder
  - Remove the currently published FY report
  - Upload the new FY report
    - Utilize the following naming convention
      - Iao_-_spo_deal_overview_report_FY##-##
        - E.g. iao_-_spo_deal_overview_report_FY19-20
    - Navigate to: [this link]() and log in.
    - Click on Assets in the top ribbon
    - On the left hand side dropdown tree navigate to Province of British Columbia à British Columbians & Our Governments à Initiatives Plans & Strategies à Open Government à Open Information àAlternative Service Delivery Contracts
    - Click on Alternative Service Delivery Contract
    - Near the top left, click on Action à Upload File(s)
    - Upload the approved Alternative Service Delivery Contract.



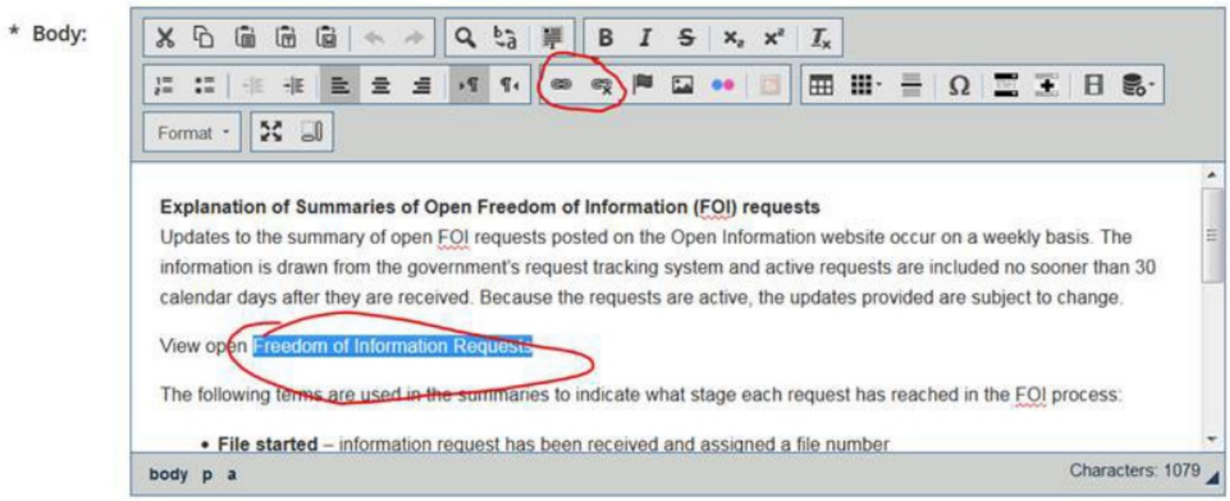
- Select the file from the list on the right side of the screen and click publish.
- Click publish now and confirm.



- From the top black ribbon click on Content.
- In the left hand tree navigate to Province of British Columbia à Initiatives, Plans & Strategies à Open Government à Open Information à Select Alternative Service Delivery Contracts
- In the right hand section of the screen, click the Topic Tab



- Scroll down to the body section, highlight the hyperlinked text "Alternative Service Delivery Contracts" then click the break link button. Confirm file size in Open Report folder and change in the hyper Link body.
- With the text still highlighted, click the hyperlink button.



- In the window that pops up, click the Asset Picker button.
- Another window will pop up. Type the file name into the search assets field (hint you can copy/paste the file name if you find it on the LAN). **Hit the TAB key.**
- The asset should appear beneath the search field. Select it and click OK.
- Click Publish.
- Click View QA and check the link to ensure it worked.
- Open an Edge browser and navigate to the Open Info website and check the link in there too just to make sure the changes are live and working as intended. If they don't work right away, clear the browser cache, wait a few minutes and try again.

Contact for ASD Contracts is Dan Cope -Director
March 27, 2023
2:07 PM

Help with Dashboard and Workflow Actions
August 16, 2022
2:06 PM

- Making Changes to Publication Groups
    - For use when updates to Ministries, Ministers, Deputy Ministers need to occur
- How to Create a Workflow
    - For making Calendar or other types of Proactive Disclosure Workflows
- Uploading Records to an individual Workflow
    - How to upload records to a workflow and prep for publication
- Publishing Process
    - Info on publishing in bulk,
    - Instructions are mostly related to publishing FOI requests each day, but the same process can be applied to publishing batches of proactive disclosures.

Monthly Calendar Escalation Process

When we're reaching out to client ministries to follow up on a CFR, Records, or Sign Offs, try to get the ministry to commit to a delivery date.

Call For Records

CFR - will send to Ministry on **Day 1** of the month
CFR Reminder - will send to Ministry on **Day 6** of the month
CFRs Due to IAO within 10 business day - call or skype individual ministry contacts on **Day 10** to ask them when they can commit to getting records to IAO.

CFR Escalation: provide Summary Email on **Day 11** to Team Lead, for follow ups on Overdue CFRs
CFR Escalation Phase 2: Team Lead to Email Manager on **Day 16** if any remaining overdue CFRs
* Assess #s for Day 16 and see if we want to push this out a bit

Sign Off Process

Send for Sign Off - IAO sends records for sign off, with a minimum of **10 Business Days Remainin**g (2 weeks before the Sign Off Date)

Sign Off Reminder 1 - Once there's **5 Business Days Remaining** (1 week away from the Sign Off Date), Evan to send an email reminder to each individual ministry contact

Sign Off Reminder 2: **1 day before Sign Off Date** (aka 3 days before LDD), Evan to call or skype individual ministry contacts on this day to ask them when they can commit to getting records to IAO.

Sign Off Escalation: Evan to provide Summary Email **on Sign Off Day** (aka 2 days before LDD) to Natalie, for follow ups on Overdue Sign Offs

Sign Off Escalation Phase 2: Natalie to Email CK on **day before the LDD**, if any remaining overdue SOs

Note:
Sign Off Date = Day IAO Publishes records, which is 2 days before the actual LDD, in case of technical challenges or sign off delays

LDD = Legislated Due Date, determined by the ministerial directive

Min. MoS, DM, ADM, PS 2023
June 14, 2023
11:00 AM
<<Ministries 2023 - Spreadsheet.xlsx>>

Portfolio	Office	Minister	MoS	DM	ADM	PS
Premier of British Columbia	OOP	David Eby		Shannon Salter	Donna Sanford	
				Douglas Caul		
Intergovernmental Relations Secretariat	IGRS			Silas Brownsey		
Attorney General of British Columbia	MAG	Niki Sharma		A/DM Barbara Carmichael		
				DSG Douglas Scott		
Anti-Racism Initiatives	A-RI					Mable Elmore
Minister of Agriculture and Food	AGR	Pam Alexis		Peter Pokorny		
Minister of Children and Family Development	CFD	Mitzi Dean	Grace Lore	Allison Bond		
Minister of Citizens' Services	CTZ	Lisa Beare		Shauna Brouwer		
Minister of Education and Child Care	ECC	Rachna Singh		Christina Zacharuk		
Minister of Energy, Mines and Low Carbon Innovation	EML	Josie Osborne		Shannon Baskerville		
Sustainable Economy	SE					Adam Walker
Minister of Environment and Climate Change Strategy (including TransLink)	MOE	George Heyman		Kevin Jardine		
Environmental Assessment Office	EAO				Elenore Arend	
Environment	ENV					Amandeep Singh
Minister of Emergency Management and Climate Readiness	EMC	Bowinn Ma		Tara Richards	Mary Maloughney	
Minister of Finance	FIN	Katrine Conroy		Heather Wood		
Crown Agencies Secretariat	CAS				Cheryl May	
Public Sector Employer's Council	PSEC				John Davison	
Public Service Agency	PSA			Deb Godfrey		
Government Communication & Public Engagement	GCPE			Marie Della Mattia		
Gender Equity	GE					Kelli Paddon
Minister of Forests	FOR	Bruce Ralston		Rick Manwaring	Eamon O'Donoghue	
Forests	FOR					Doug Routley
Minister of Health	HTH	Adrian Dix		Stephen Brown	Teresa Dobmeier	
					Maureen O'Donnell	
					Jonathan Dube	
Rural Health	RH					Jennifer Rice
Seniors' Services & Long-Term Care	SSLT					Harwinder Sandhu
Minister of Housing	HSG	Ravi Kahlon		Teri Collins		
Rural Development	RD					Roly Russell
Minister of Indigenous Relations and Reconciliation	IRR	Murray Rankin		Tom McCarthy	Jessica Wood	
Minister of Jobs, Economic Development and Innovation	JED	Brenda Bailey	Jagrup Brar	Fazil Mihlar		
Minister of Labour	LBR	Harry Bains		Trevor Hughes		
Labour	LBR					Janet Routledge
Minister of Water, Land and Resource Stewardship	WLR	Nathan Cullen		Lori Halls		
Fisheries & Aquaculture	F&A					Kelly Greene
Watershed Restoration	WR					Fin Donnelly
Minister of Mental Health and Addictions	MHA	Jennifer Whiteside		Christine Massey		
Minister of Municipal Affairs	MMA	Anne Kang		Yuma Morisho		
Minister of Post-Secondary Education and Future Skills	PSE	Selina Robinson	Andrew Mercier	Bobbi Plecas		
Minister of Public Safety and Solicitor General and Deputy Premier	PSS	Mike Farnworth		Douglas Scott		
Minister of Social Development and Poverty Reduction	MSD	Sheila Malcolmson		David Galbraith		
Accessibility	A11Y					Susie Chant
Community Development & Non-profits	CD&N					Megan Dykeman
Minister of Tourism, Arts, Culture and Sport	TAC	Lana Popham		Neilane Mayhew		
Arts & Film	A&F					Bob D'Eith
Tourism	TOUR					Brittny Anderson
Minister of Transportation and Infrastructure	TRA	Rob Fleming	Dan Coulter	Kathryn Krishna	Kevin Richter	

Ministries 2022
May 26, 2023
10:01 AM

<<Ministries 2022 - Spreadsheet.xlsx>>

Portfolio		Minister	MoS	DM	ADM
Premier of British Columbia	OOP	David Eby		Douglas Caul Mark Sieben	Donna Sanford
inter-Government Relations Secretary				Silas Brownsey	Pierrette Maranda
Attorney General of British Columbia	MAG	Niki Sharma		DAG - Barbara Carmichael DSG- Douglas Scott HSG - Teri Collins	
Minister of Agriculture and Food	AGR	Pam Alexis		Peter Pokorny	
Minister of Children and Family Development	CFD	Grace Lore	Katrina Chen	Allison Bond	
Minister of Citizens' Services	CTZ	Lisa Beare		Shauna Brouwer	CJ Ritchie
Ministry of Advanced Education & Skills Training	AEST	Anne Kang		Shannon Baskerville	
Minister of Education and Child Care	ECC	Rachna Singh	Katrina Chen	Christina Zacharuk	
Minister of Energy, Mines and Low Carbon Innovation	EML	Josie Osborne		Fazil Mihlar Shannon Baskerville	
Minister of Environment and Climate Change Strategy (including TransLink)	ENV	George Heyman		Kevin Jardine	
Environmental Assessment Office	EAO				Elenore Arend
Minister of Emergency Management and Climate Readiness	EMC	Bowinn Ma		Tara Richards	Sue Maloughney
Minister of Finance	FIN	Selina Robinson		Heather Wood	
Crown Agencies Secretariat	CAS				Cheryl May
Public Sector Employer's Council	PSEC				John Davison
Public Service Agency	PSA			Bobbi Sadler Deb Godfrey	
Government Communication & Public Engagement	GCPE			Don Zadravec Marie Della Mattia A/DM - Sage Aaron	
Minister of Forests	FOR	Bruce Ralston		Richard Manwaring	Eamon Donoghue
Minister of Health (and Francophone Affairs)	HTH	Adrian Dix		Stephen Brown	Jonathan Dube Teresa Dobmeier Maureen O'Donnell
Minister of Housing	HSG				
Minister of Indigenous Relations and Reconciliation	IRR	Murray Rankin		Tom McCarthy	Jessica Dawn Wood
Minister of Jobs, Economic Recovery and Innovation	JED	Ravi Kahlon	George Chow	Bobbi Plecas	
Minister of Labour	LBR	Harry Bains		Trevor Hughes	
Minister of Land, Water and Resource Stewardship	WLR	Josie Osborne		Lori Halls	
Minister of Mental Health and Addictions	MHA	Sheila Malcolmson		Christine Massey	
Minister of Municipal Affairs	MA	Nathan Cullen		Yumo Morisho	
Minister of Public Safety and Solicitor General	PSS	Mike Farnworth		Douglas Scott	
Minister of Social Development and Poverty Reduction	SDPR	Nicholas Simons		David Galbraith	
Minister of Tourism, Arts, Culture and Sport	TAC	Lisa Beare		Neilane Mayhew	
Minister of Transportation and Infrastructure	TRA	Rob Fleming Dan Coulter	Bowinn Ma	Kathryn Krishna	Kevin Richter
Minister of State for Transportation and Infrastructure		Dan Coulter			
Minister of State for Workforce Development		Andrew Mercier			

Calendar Blurbs
March 8, 2022
13:48

Blurb Purpose	Blurb
Sign off	Thank you for sending your **[MONTH]** calendar to Open Information for publication. Your calendar has been reviewed by an Open Information analyst and any information that required redaction has been removed. Please review and approve the attached redline version of your calendar(s). Please reply to this email to Open.InfoGroup@gov.bc.ca by **[DUE DATE]** indicating your approval for publication. If you identify any redaction revisions, please indicate this in your email. For your convenience, the attached approval form is available to you. Alternatively, you may indicate your approval by replying directly to this email.

	If you have any questions or concerns, please contact any member of the Open Information team directly or through reply to this email address.
Sign off overdue reminder	Good afternoon, Just a friendly reminder of the request for Minister **[NAME]'s [Month]** Calendar that was due on the **[DATE]**, in order for us to complete processing in time for publication on Open Information. Please send as soon as you can, and do let us know if we missed a communication, or there has been a change in Ministry calendar contact information, or you have any questions or concerns. Kind regards, **[insert team signature]**

Calendar Processing Timeline
September 13, 2023
1:54 PM

Good morning,
Since we have so many people coming and going in all our offices these days, we wanted to take a moment and touch base regarding monthly calendars published as part of our Ministerial directives. A copy of the calendar directive can be found here.

Ministry Contact List
First, we wanted to confirm your contacts for CFRs and Approvals. Attached is list of our current contacts for your ministry. Please respond to confirm or recommend changes.
In addition, we wanted to provide a list of important dates to help streamline the processing of these monthly calendars.

Please note that clean calendars can be proactively provided on the first of every month and proactively approved for release.

CALENDAR PROCESSING TIMELINE

***Calendars MUST be published no later than 45 calendar days after the end of the month to which they relate. ***

Call For Records
IAO will always send the ministry a call for records on the first business day AFTER the month being requested.

e.g. November Calendar CFR will be sent to the ministry on December 1 or can be proactively provided by the Ministry on the 1st

<u>Gathering Records</u>
As stated in the directive, "ministries must provide calendars to Information Access Operations (IAO) in the Corporate Information and Records Management Office, **not later than 10 calendar days** after the end of the month to which they relate".
Therefore, ministries can send IAO their calendars any time on, or before, 10 calendar days (not business days!) We will always include this date in the CFR, but we recommend setting up reminders in your calendar to ensure you're meeting this legislated requirement.

We'd also like to take this opportunity to provided a **Best Practice Guide** (attached) for those who manage monthly calendars. We strongly recommend <u>updating calendar content BEFORE providing them to our office.</u>

Please Note: General harms such as locations will always be redacted by OI. This eliminates the time-consuming task for ministry personnel to highlight these types of harms. However, we do request that ministry specific harms or personal harms be indicated clearly.

s. 13

If your calendars do not have any recommended harms, you can send IAO the records **AND** advise us that this month's calendar has been **pre-approved for release!** This removes the need to go back and forth for approval later on!
<u>Approvals</u>
IAO aims to provide you with 10 business days for final approval of records.
We really appreciate your help in this process! We are here to answer any questions you might have!
Thanks very much,
The Open Information Team

BRITISH COLUMBIA | INFORMATION ACCESS OPERATIONS
A BRANCH of SHARED SERVICES BC

Severing
August 15, 2022
5:28 PM

Find information regarding severing options here

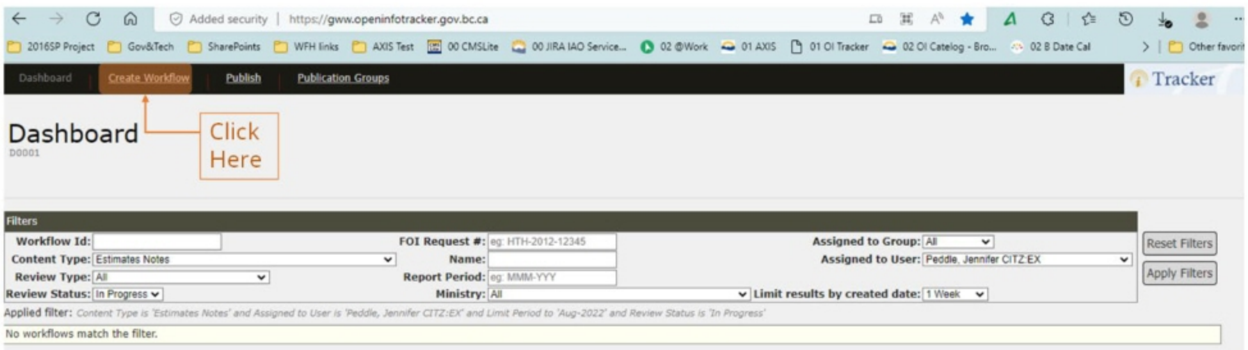
New Confidential OOP email address
August 21, 2023

Creating Dashboard Workflow
August 15, 2022
3:32 PM

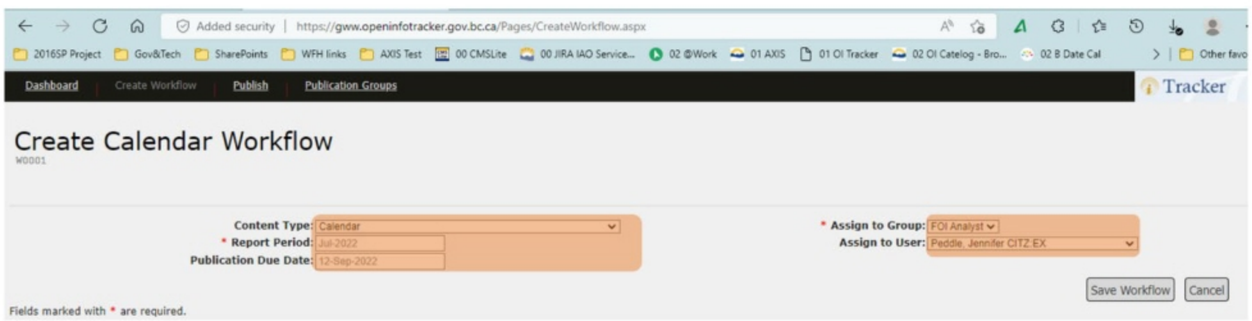
If there are changes to Ministers of Deputy Ministers or Ministries than those changes need to be added to the Publication Groups before the Workflow is created.
Instructions can be found here: How to Update [Proactive Disclosure Publication Groups for Workflows]()

Creating a Dashboard Workflow

- Go to the Dashboard: https://gww.openinfotracker.gov.bc.ca/
- While these instructions talk about Calendars, they can be used to create any kind of workflow



  - This will open the page where you will create the entire workflow for Calendars or whatever Proactive workflow you are creating.

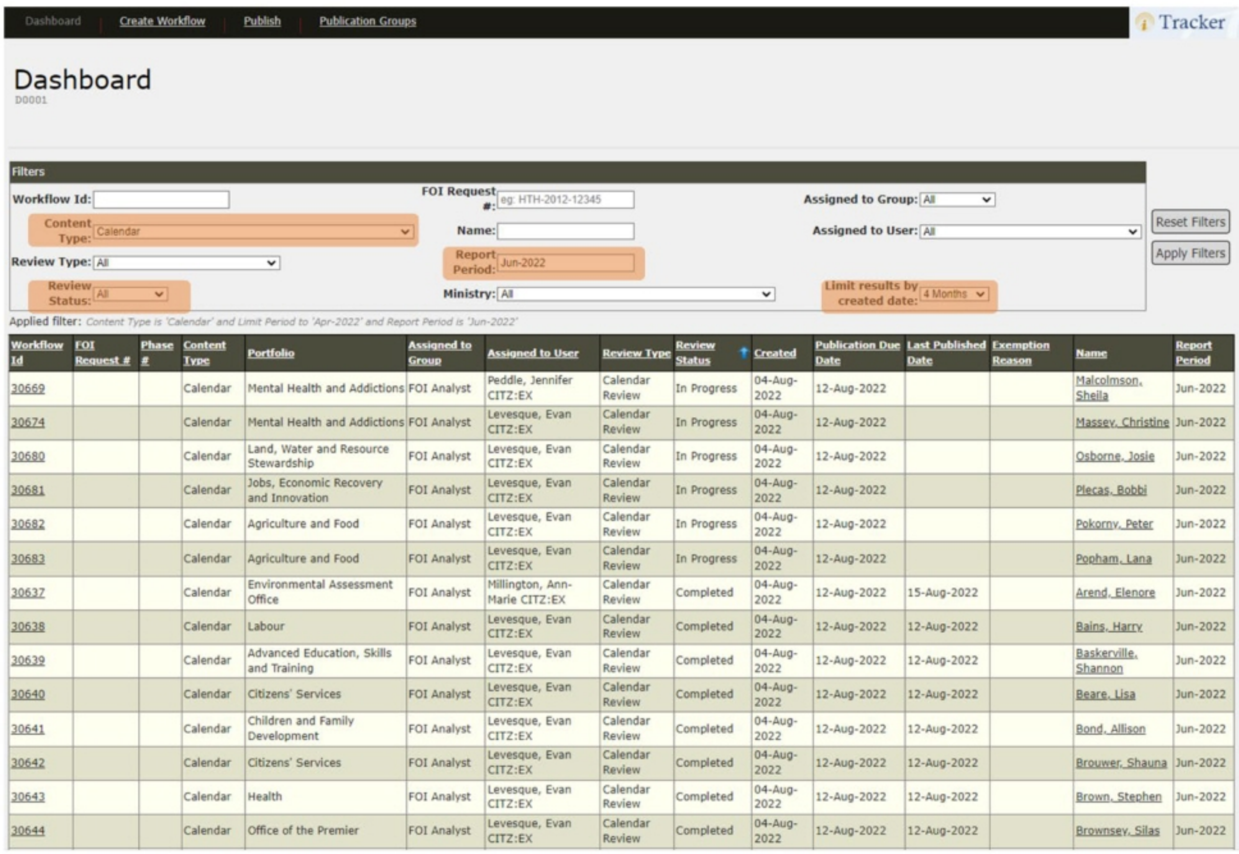


Fill in the various blanks:

- Content Type: Choose the type of Workflow you'd like to create, calendar or otherwise
- Report Period: Choose a date within the month of the Report Period.
  - For example: if the month is July 2022. I choose July 1, 2022. I use the first of the month as a rule of thumb.

- Publication Date: we usually choose about 3 days before the actual due date. So for July that would be September 12, 2022.
- Assign to Group: Choose FOI Analyst, we don't use the other options.
- Assign to User: Choose yourself, or whomever is going to be processing the file.
  - This process will create all the workflows for all the calendars (or whatever proactive) so you want to assign them to the person who will be doing them, otherwise you will need to reassign each individual file.

  - Now when you search for the particular workflow in the specific Report Period you created, you will receive a list of files to choose from.
  - You can select the workflow from the load each record into the individual workflows.

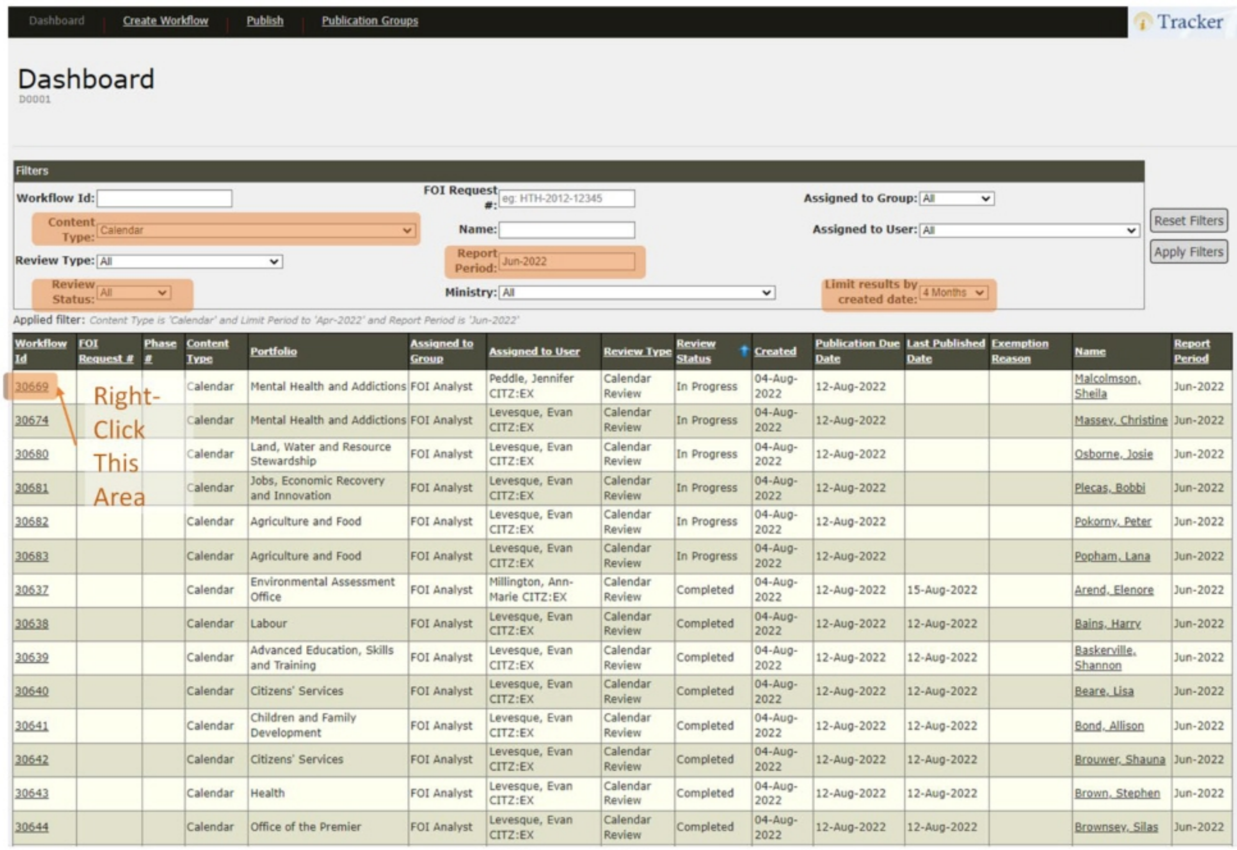


Workflow Id	FOI Request #	Phase #	Content Type	Portfolio	Assigned to Group	Assigned to User	Review Type	Review Status	Created	Publication Due Date	Last Published Date	Exemption Reason	Name	Report Period
30669			Calendar	Mental Health and Addictions	FOI Analyst	Peddle, Jennifer CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Malcolmson, Sheila	Jun-2022
30674			Calendar	Mental Health and Addictions	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Massey, Christine	Jun-2022
30680			Calendar	Land, Water and Resource Stewardship	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Osborne, Josie	Jun-2022
30681			Calendar	Jobs, Economic Recovery and Innovation	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Plecas, Bobbi	Jun-2022
30682			Calendar	Agriculture and Food	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Pokorny, Peter	Jun-2022
30683			Calendar	Agriculture and Food	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	In Progress	04-Aug-2022	12-Aug-2022			Popham, Lana	Jun-2022
30637			Calendar	Environmental Assessment Office	FOI Analyst	Millington, Ann-Marie CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	15-Aug-2022		Arend, Elenore	Jun-2022
30638			Calendar	Labour	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Bains, Harry	Jun-2022
30639			Calendar	Advanced Education, Skills and Training	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Baskerville, Shannon	Jun-2022
30640			Calendar	Citizens' Services	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Beare, Lisa	Jun-2022
30641			Calendar	Children and Family Development	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Bond, Allison	Jun-2022
30642			Calendar	Citizens' Services	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brouwer, Shauna	Jun-2022
30643			Calendar	Health	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brown, Stephen	Jun-2022
30644			Calendar	Office of the Premier	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brownsey, Silas	Jun-2022

Working in Workflows
August 16, 2022
1:44 PM

When you have searched for records in the dashboard related to the workflow you're interested in or have just created. You should see a list of files:

- find the file you're interested in
- right click over the Workflow ID area,
- choose open in New Tab
    - This will open that particular file in a new tab,
    - This is the recommended method of navigation of individual files because it avoids the process of having to reconduct a search if you just click on the file you would like to open.



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30639			Calendar	Advanced Education, Skills and Training	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Baskerville, Shannon	Jun-2022
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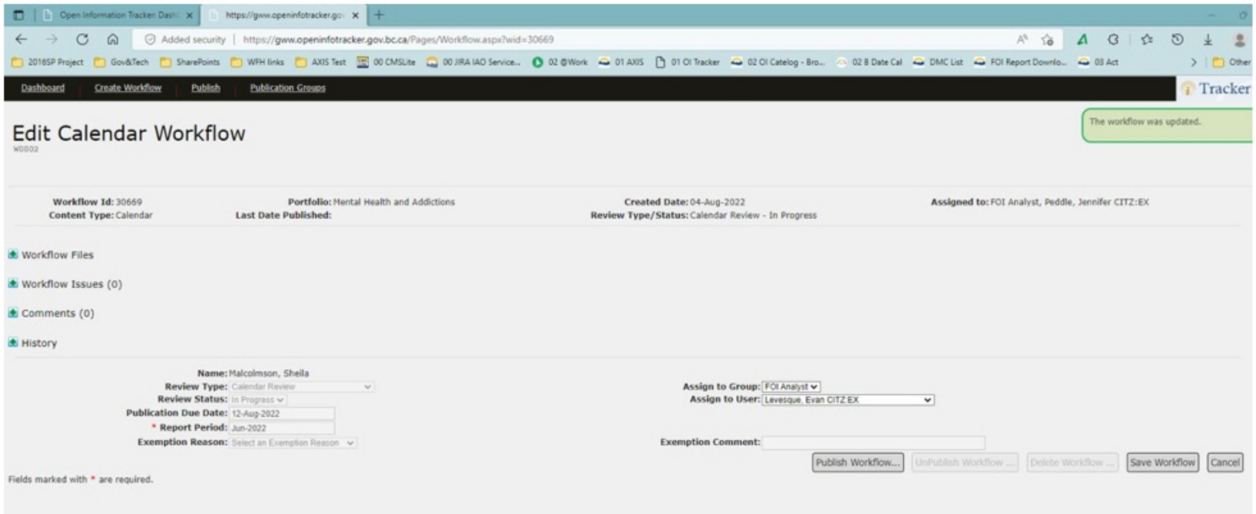
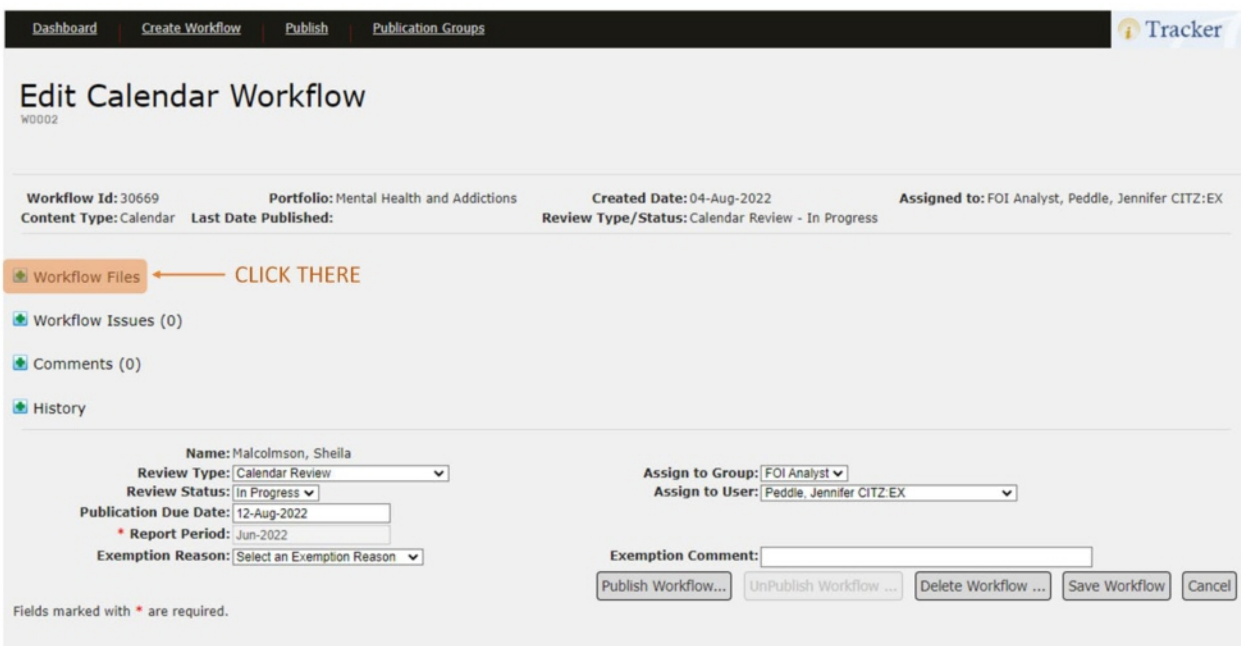
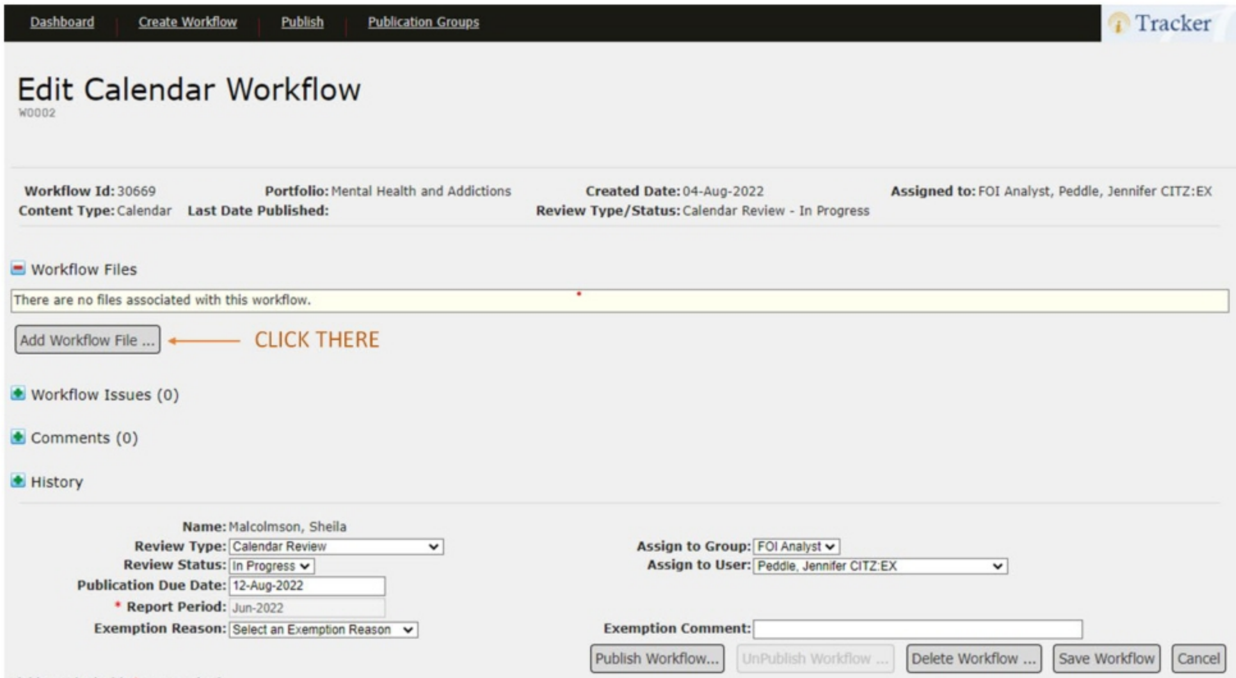
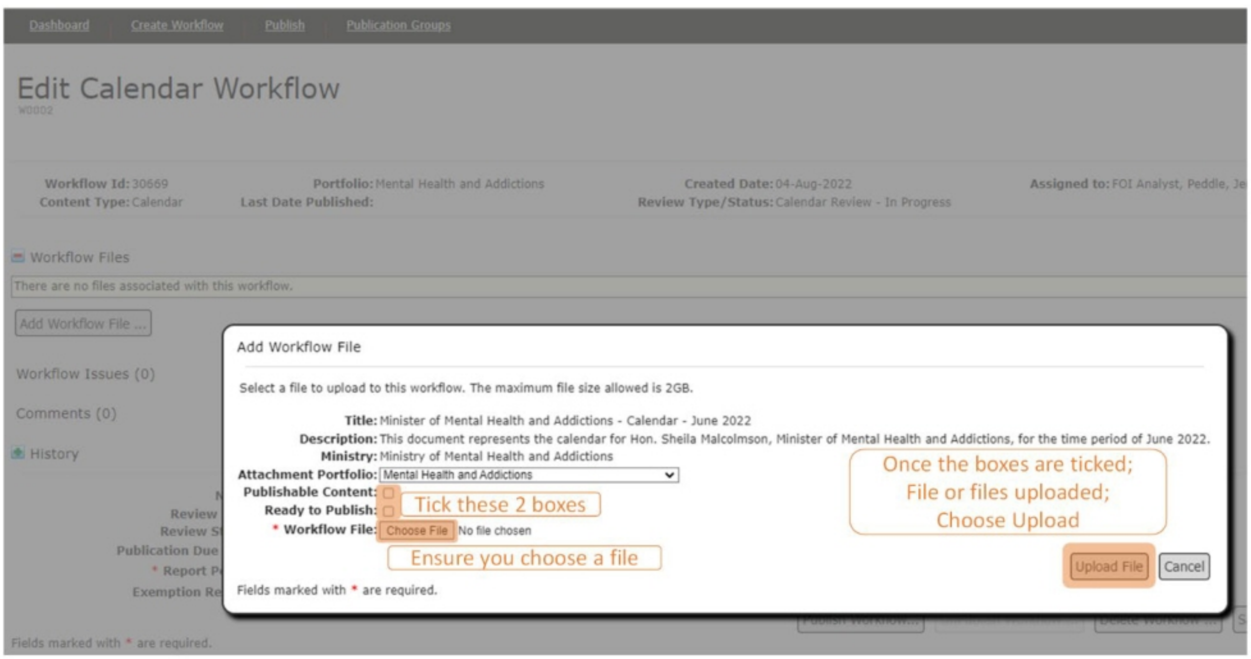
30641			Calendar	Children and Family Development	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Bond, Allison	Jun-2022
30642			Calendar	Citizens' Services	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brouwer, Shauna	Jun-2022
30643			Calendar	Health	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brown, Stephen	Jun-2022
30644			Calendar	Office of the Premier	FOI Analyst	Levesque, Evan CITZ:EX	Calendar Review	Completed	04-Aug-2022	12-Aug-2022	12-Aug-2022		Brownsey, Silas	Jun-2022



- First assign the workflow to yourself if it isn't already and refresh the page.
- This allows you to Add Workflow File:
  - Click on + near Workflow Files, then click add workflow file, it will open a pop up





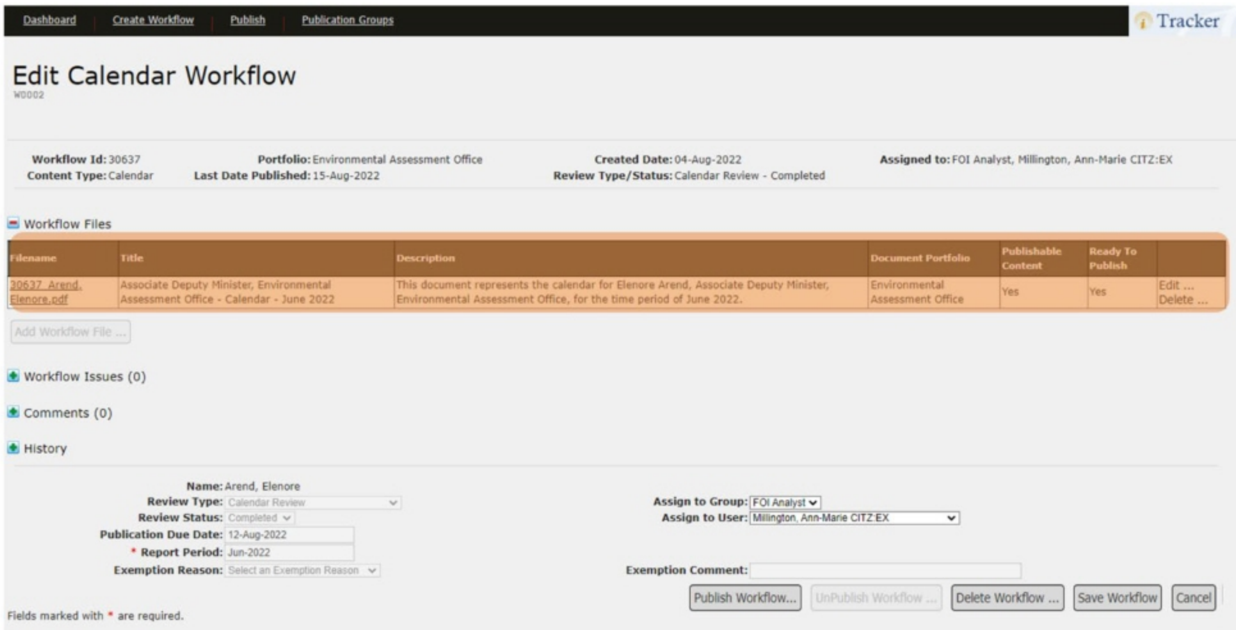


Note if you forget to:

- Tick these two boxes you will have to delete the entry, because editing them doesn't work.
- Choose a workflow, and hit upload file, the system will create a blank named version of the file as a pretend upload, and when you go to publish the record will be blank.
    - While the process seems really quick, it's important to remember to choose a workflow file before you upload.
        - Otherwise you end up with a blank entry, and you'll have to delete it as the edit function doesn't work.

Once you click Upload file it will take you to the following view:

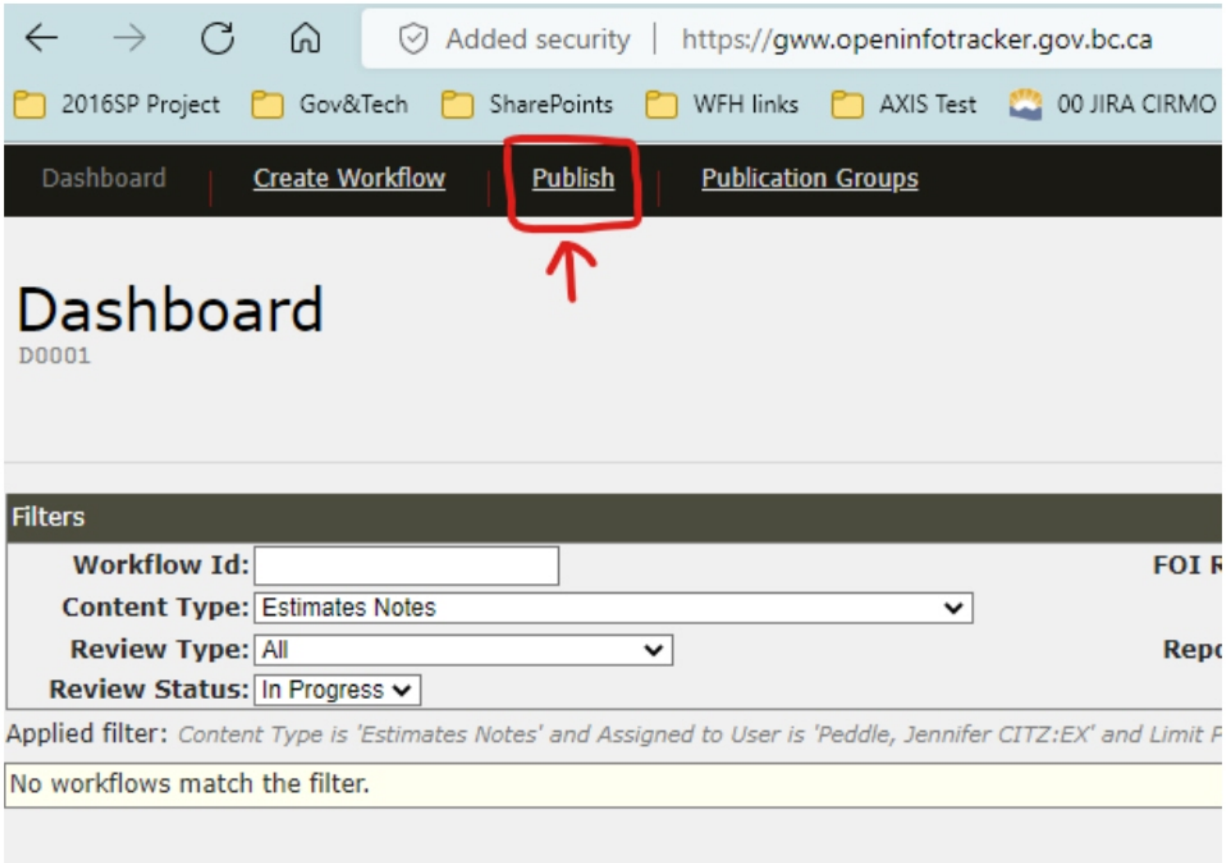
- You will see the file you just uploaded, as well as the Publishable Content and Ready to Publish options are both Yes, if you you've done it correctly.
- You can choose publish workflow from here if you want, or if there is a batch you can publish using the [Publish](#) Option.



Publication Process
May 4, 2023
12:44 PM

Publication Process

From the OI Dashboard choose the Publish Link at the top of the screen:



When you are on the publishable content screen, if there are only 10 files listed, choose Select All, and then Publish. **IF there are more than 10 files displayed on this screen then** you need to **select ONLY 10** files at a time and publish in batches (Fatal Errors occur otherwise)

Once you've chosen publish you need to **wait** on this page until a pop up window appears stating files are published, **select ok** and carry on with your day

Dashboard | Create Workflow | Publish | Publication Groups

Publishable Content

P0001

Filters

Publication Due Date:

Content Type: All

Review Type: All

Review Status: All

	Workflow Id	Content Type	Portfolio	Publication Due Date
☑	29600	FOI General		13-Jun-2022
☑	29566	FOI General		13-Jun-2022
☑	29569	FOI General		13-Jun-2022
☑	21568	FOI General		13-Jun-2022
☑	29017	FOI General		13-Jun-2022
☑	29556	FOI General		13-Jun-2022
☑	29763	FOI General		13-Jun-2022
☑	29568	FOI General		13-Jun-2022
☑	29602	FOI General		13-Jun-2022
☑	29577	FOI General		13-Jun-2022

select all select none

Publish Selected

Ensure that after you choose OK to publish you see a Publication Message that looks like this:

View Publication Messages

Message Type	Message
Information	FOI Workflow 31063 : CTZ-2021-10277 Response_Letter_CTZ-2021-10277.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 31063 : CTZ-2021-10277 Response_Package_CTZ-2021-10277.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 26136 : EML-2021-11747 Response_Letter_EML-2021-11747.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 26136 : EML-2021-11747 Response_Package_EML-2021-11747.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 21699 : FIN-2019-98215 Response_Letter_FIN-2019-98215.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 21699 : FIN-2019-98215 Response_Package_FIN-2019-98215.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 26774 : GCP-2021-13232 Response_Letter_GCP-2021-13232.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 26774 : GCP-2021-13232 Response_Package_GCP-2021-13232.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 24091 : HTH-2020-05640 Response_Letter_HTH-2020-05640.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 24091 : HTH-2020-05640 Response_Package_HTH-2020-05640_.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 25145 : JTT-2020-01435 Response_Letter_JTT-2020-01435.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 25145 : JTT-2020-01435 Response_Package_JTT-2020-01435.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 18228 : MOE-2019-95716 Response_Letter_MOE-2019-95716.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 18228 : MOE-2019-95716 Response_Package_MOE-2019-95716.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 31089 : MOE-2021-11375 Response_Letter_MOE-2021-11375.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 31089 : MOE-2021-11375 Response_Package_MOE-2021-11375.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 22416 : TRA-2020-00831 Response_Letter_TRA-2020-00831.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 22416 : TRA-2020-00831 Response_Package_TRA-2020-00831.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 24804 : TRA-2020-06755 Response_Letter_TRA-2020-06755.pdf successfully published on : 19-Apr-2023
Information	FOI Workflow 24804 : TRA-2020-06755 Response_Package_TRA-2020-06755_.pdf successfully published on : 19-Apr-2023

OK

If there are any Errors in the Publication message, take a screenshot and report it to your supervisor, as it will likely need to be reported to IMB:

Example of an Error:

View Publication Messages

Message Type	Message
Error	Workflow 32852: Workflow publication failed - system error occurred during processing of System.ArgumentException: Illegal characters in path. at System.IO.Path.CheckInvalidPathChars(String path, Boolean checkAdditional) at System.IO.Path.GetFileName(String path) at System.IO.File.InternalWriteAllBytes(String path, Byte[] bytes, Boolean checkHost) at Tracker.Data.PublishWorkflow.AddBriefingNoteDocumentsToSiteMap(String sHTMLTemplate) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1953 at Tracker.Data.PublishWorkflow.CreateSiteMap(String workflowRetrievalCode, String workflowRecordUID, String workflowTitle, String workflowDescription, String workflowHighLevelSubject, String workflowSubject, String workflowPublishDate, String workflowTimeStamp, String workflowContributor, String workflowRecordURL, String workflowMonth, String workflowYear, String workflowApplicantType, String workflowFees, String workflowPositionTitle, String workflowIndividualName) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1494 at Tracker.Data.PublishWorkflow.PublishBriefingNoteWorkflow(Int64 workflowID, Int64 createUserId) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 487 at Tracker.Data.PublishWorkflow.PublishSelectedWorkflows(List`1 selectedWorkflowIDs, Int64 createUserId, String publicationType) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 279
Error	Workflow 32853: Workflow publication failed - system error occurred during processing of System.ArgumentException: Illegal characters in path. at System.IO.Path.CheckInvalidPathChars(String path, Boolean checkAdditional) at System.IO.Path.GetFileName(String path) at System.IO.File.InternalWriteAllBytes(String path, Byte[] bytes, Boolean checkHost) at Tracker.Data.PublishWorkflow.AddBriefingNoteDocumentsToSiteMap(String sHTMLTemplate) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1953 at Tracker.Data.PublishWorkflow.CreateSiteMap(String workflowRetrievalCode, String workflowRecordUID, String workflowTitle, String workflowDescription, String workflowHighLevelSubject, String workflowSubject, String workflowPublishDate, String workflowTimeStamp, String workflowContributor, String workflowRecordURL, String workflowMonth, String workflowYear, String workflowApplicantType, String workflowFees, String workflowPositionTitle, String workflowIndividualName) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1494 at Tracker.Data.PublishWorkflow.PublishBriefingNoteWorkflow(Int64 workflowID, Int64 createUserId) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 487 at Tracker.Data.PublishWorkflow.PublishSelectedWorkflows(List`1 selectedWorkflowIDs, Int64 createUserId, String publicationType) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 279
Error	Workflow 32854: Workflow publication failed - system error occurred during processing of System.ArgumentException: Illegal characters in path. at System.IO.Path.CheckInvalidPathChars(String path, Boolean checkAdditional) at System.IO.Path.GetFileName(String path) at System.IO.File.InternalWriteAllBytes(String path, Byte[] bytes, Boolean checkHost) at Tracker.Data.PublishWorkflow.AddBriefingNoteDocumentsToSiteMap(String sHTMLTemplate) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1953 at Tracker.Data.PublishWorkflow.CreateSiteMap(String workflowRetrievalCode, String workflowRecordUID, String workflowTitle, String workflowDescription, String workflowHighLevelSubject, String workflowSubject, String workflowPublishDate, String workflowTimeStamp, String workflowContributor, String workflowRecordURL, String workflowMonth, String workflowYear, String workflowApplicantType, String workflowFees, String workflowPositionTitle, String workflowIndividualName) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 1494 at Tracker.Data.PublishWorkflow.PublishBriefingNoteWorkflow(Int64 workflowID, Int64 createUserId) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 487 at Tracker.Data.PublishWorkflow.PublishSelectedWorkflows(List`1 selectedWorkflowIDs, Int64 createUserId, String publicationType) in C:\Users\colin.anderson\source\repos\website\Tracker.Data\PublishWorkflow.cs:line 279

OK

Calendar Severing and Consistency

July 21, 2022
9:13 AM

Subject	**NOTICE - Open Information update**
From	Pinske, James CITZ:EX
To	
Cc	CITZ OPEN INFOGROUP CITZ:EX; Pinske, James CITZ:EX; Beach, Kara CITZ:EX; Onciul, Jamie CITZ:EX
Sent	April 28, 2023 11:29 AM

Good morning, please be advised of the following updates that are in effect as of May.

1. **Parliamentary Secretary Calendars:**
    a. As per Ministerial Directive, 01-2023: Parliamentary Secretaries' Calendars, these calendars are now required to be disclosed proactively. The first effective reporting period under the new directive is for the April Calendars. On May 1st, you can expect to receive the updated Calendar "call for records" (CFR), which will now include Parliamentary Secretary Calendars as a required record for disclosure. Records will be due May 10th, 2023. For details on the process as well as Best Practices, please see the Client Guide for Calendars on the Open Information SharePoint site. If you have any additional questions or concerns, please do not hesitate to contact me directly.

2. s. 14

s. 14

Thank you for your continued support. If you have any questions, concerns, or feedback, please do not hesitate to contact me directly or the team at Open.InfoGroup@gov.bc.ca

Regards,

James Pinske, Manager

Innovation & Open Information
Information Access Operations
Ministry of Citizens' Services

Phone: 778.698.3023
Email: James.Pinske@gov.bc.ca
Web: Open Information

PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

OI Calendar Severing Guide

November 3, 2023
11:48 AM

s. 13

s. 13

s. 13

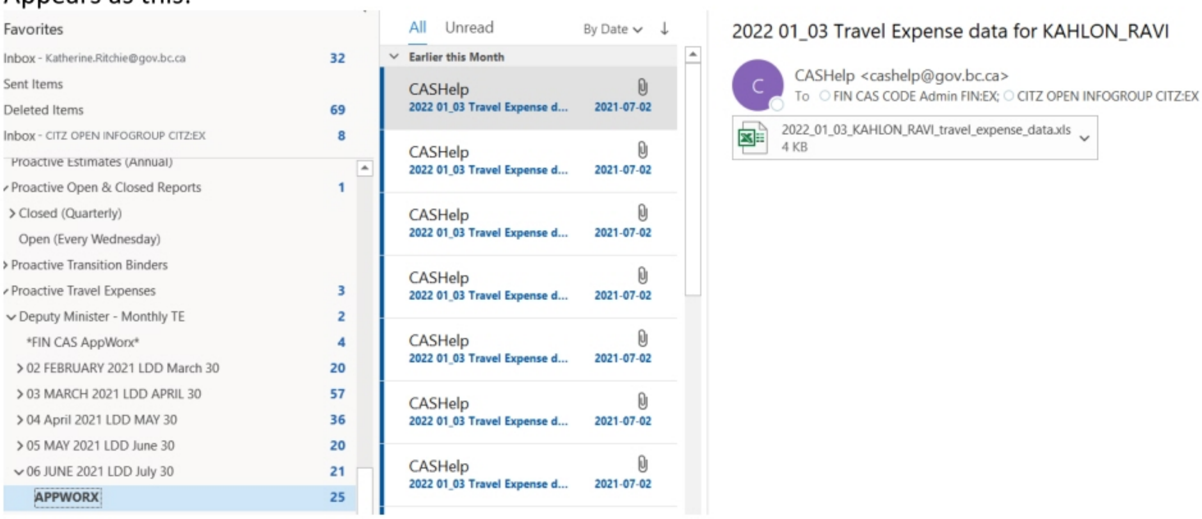
AppWorx Workflow

July 27, 2021
11:23 AM

AppWorx Workflow:

1. **File the MTE summaries in OUTLOOK.** OI Team inbox receives workflow files on the 1st of each month. Dump them all into the Outlook folder for the corresponding Month titled, "AppWorx"

Appears as this:



2. **Identify which summaries are current Deputy Minister summaries.** Open k drive file found K:\Open Information\1. Proactive Release\Travel Expenses or quick link below - this is a Current list of DMs. Also Open the MTE July Tracking sheet file found K:\Open Information\1. Proactive Release\Travel Expenses\2021-07-JULY MTE or at the quick link below.

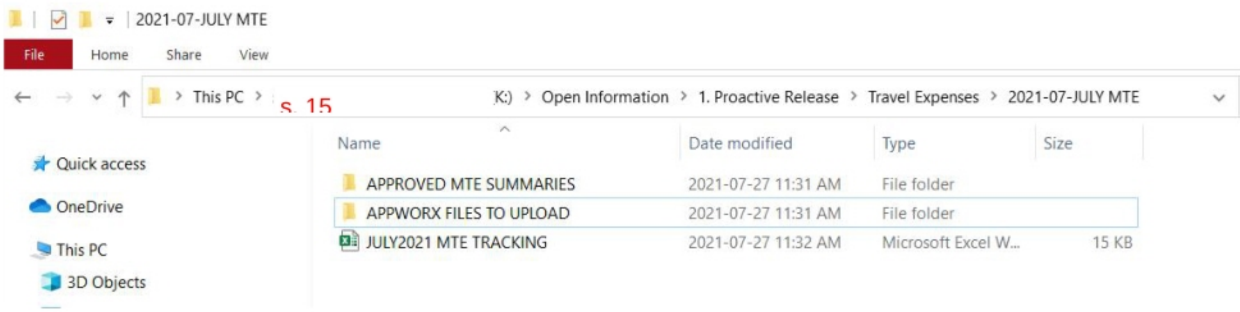
<<JULY2021 MTE TRACKING.xlsx>>

<<Ordered List of DMs.xlsx>>

Many DM files will be missing as we are only in the second quarter and if DMs do not have travel expenses, there will be no AppWorx file generated by FINCAS for them, this is totally normal. FINCAS sends us more files than necessary for ADMs, Ministers, ect., this is something we will attempt to Lean Out in 2022.

- Open the AppWorx folder in Outlook
- In the search bar, look up each DM by last name according to the tracking sheet
- Ordered List of DMs is for reference only, and is updated when staffing changes in Government

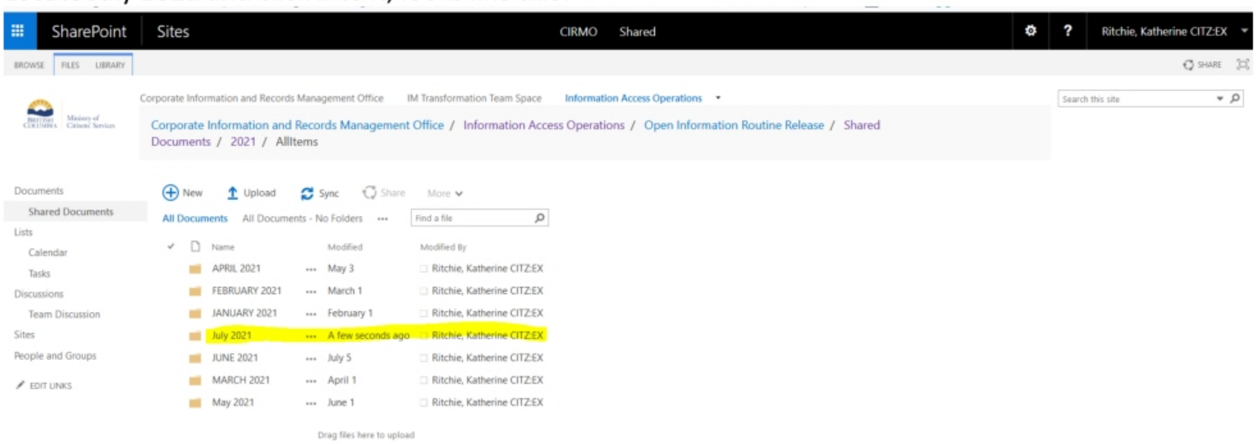
3. **Drag and Drop current DM AppWorx files** into the "APPWORX FILES TO UPLOAD" folder on k drive (snippet below)



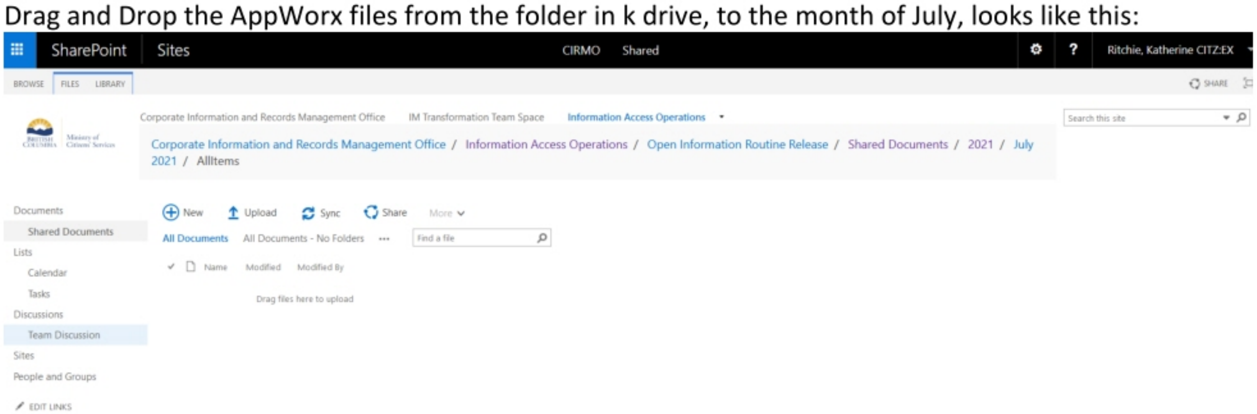
The files you drag into APPWORX FILES TO UPLOAD will be drag and dropped into Sharepoint - we cannot move items from Outlook into Sharepoint directly.

4. **Upload AppWorx Files to Sharepoint**

Here is the link to Sharepoint, you may need to log in with your IDIR.
https://citz.sp.gov.bc.ca/sites/CIRMO/IAO/OIRR/Shared%20Documents/Forms/AllItems.aspx
Locate July 2021 and click into it, looks like this:



Drag and Drop the AppWorx files from the folder in k drive, to the month of July, looks like this:



You're Done!
Individual ministry contacts will collect their data from here. Then they will email us 1 page summaries we convert to landscape PDf and save to k drive to "APPROVED MTE SUMMARIES" for uploading in the OI Tracker.

How to Review Open Report

June 1, 2021
2:56 PM

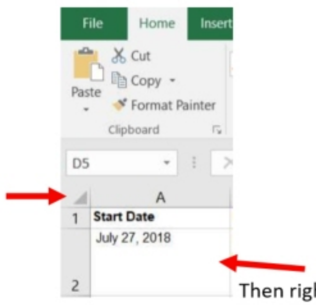
<<Open FOI Report Review.docx>>

Review Process for Weekly Open FOI Report

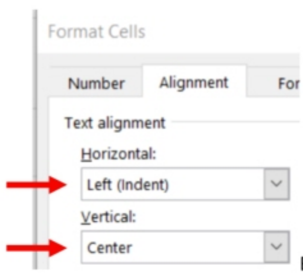
August 26, 2018
Updated June 2021
Katherine Ritchie

Once email is received from the BIAS Team with the Excel spreadsheet attached:

- Open excel and check that the date at the top of the list is the correct date for the current reporting period, then go to the bottom of the report (hold Ctrl key and press the arrow down) and ensure that it is a date in and around November 2, 2018.
- Go back to the top and select all:



Then right click in the first date cell and select "Format Cells" selecting the "Alignment" tab at the top.

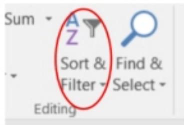


Ensure the Horizontal and Vertical are set as shown here then click OK.

- Next select the entire "Request Number" column and hit Ctrl-F (Options, toggle "Match case" on)
    - In the "Find what" search-box select, one at a time, the following three file prefixes - OBC, MGC, PSE, IIO and CLB - make completely sure none of those types of files have made it to the open report. If one of those file types gets through, immediately advise your supervisor or manager. (Supervisor/Manager will advise BIAS team)
- Once these steps are complete, go in to the following folder: K:\Open Information\1. Proactive Release\Open FOI Requests\1. Reference Documents
- Open "Statuses for Open File Report.xlsx"
- In the Open Report, select the cell at the top of the column where "Status" is typed and then click on Sort & Filter:

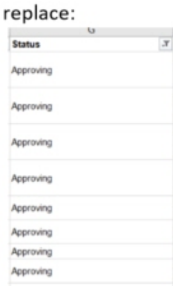
Review Process for Weekly Open FOI Report

August 26, 2018
Updated June 2021
Katherine Ritchie



then click on "Filter"

- Copy "Approving" in the Statuses for Open FOI Requests list and then use the filter drop down in the report column for Status and first deselect all the selections, then select all the items that are listed in the reference document that fit with approving in the Report and past – text in to replace:

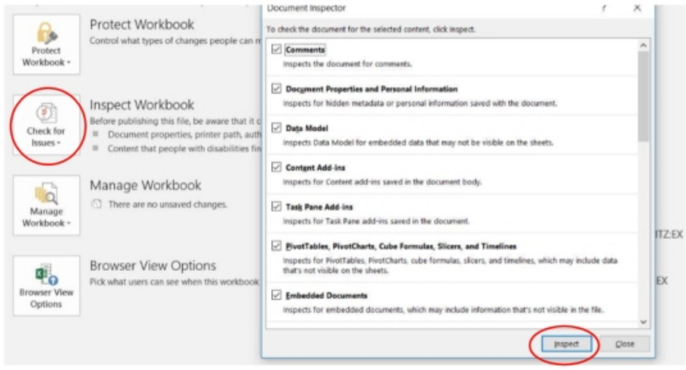


- Do the same with each of the remaining statuses.
- Once complete, unselect the Filter tab and Save with the same naming convention as the previous reports found in the folder K:\Open Information\1. Proactive Release\Open FOI Requests (save as, click on the previous week's report, then advance each date by seven days and save – for example "Open_FOI_Requests_November1-December10_Publish_January9" becomes "Open_FOI_Requests_November1-December17_Publish_January16" Leave November1 alone. Then drag and drop last week's report into the Past Reports folder)
    - **N.B. ordinarily, Blank spaces in the Status column are an anomaly requiring investigation and correction, however, there is currently a s.43 review occurring with a description of "All emails sent to or received from [specified email] including cc's and bcc's" – this status should be replaced with "Legislative Review". In the case of other blank Statuses, investigate in AXIS and bring any questions/concerns to your supervisor or manager**
- Email supervisor/manager (cc other team members) to advise the report has been reviewed and saved in usual spot. Supervisor/manager will quickly give the file a once over to search for anything missed.

Review Process for Weekly Open FOI Report

August 26, 2018
Updated June 2021
Katherine Ritchie

At this point, the file will be sanitized by going to the File tab and selecting Inspect Workbook, inspecting it, and removing anything, inspecting it again to ensure nothing is missed:



- Save once inspected and report is now ready for submission. Manager signs off and the record is published online via CMS Lite.

IMPORTANT: There will be two files in the Open FOI Requests folder – the most recent report (which will be migrated to the Past reports folder when the newest report is completed) and the past report, which is the last report published under directive 05-2016 titled "Open_FOI_Requests_October14-November30_Publish_January2" – This report must be **left alone and unopened.** It part of the newest ministerial directive that this report remain up for those wishing to go back before 2019 to have a place to look.

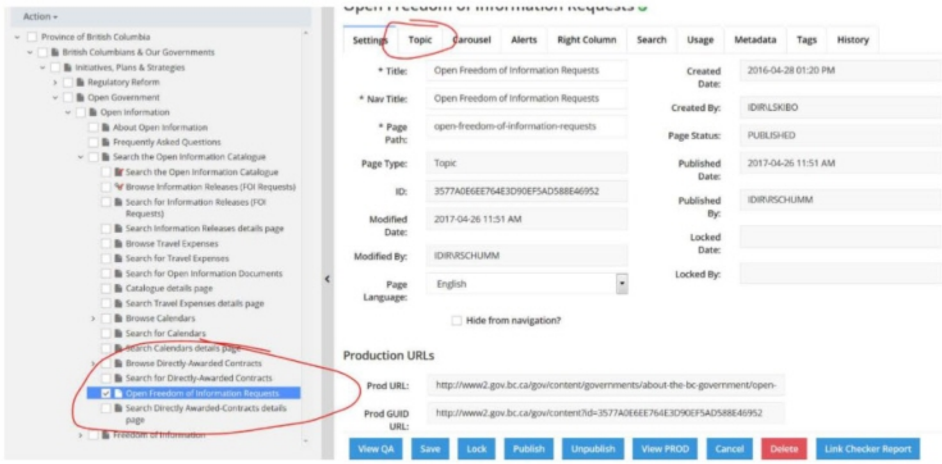
This is a continuously evolving report, these instructions are meant as a guideline, and should not be taken as inclusive – use your own best judgement.

Overview

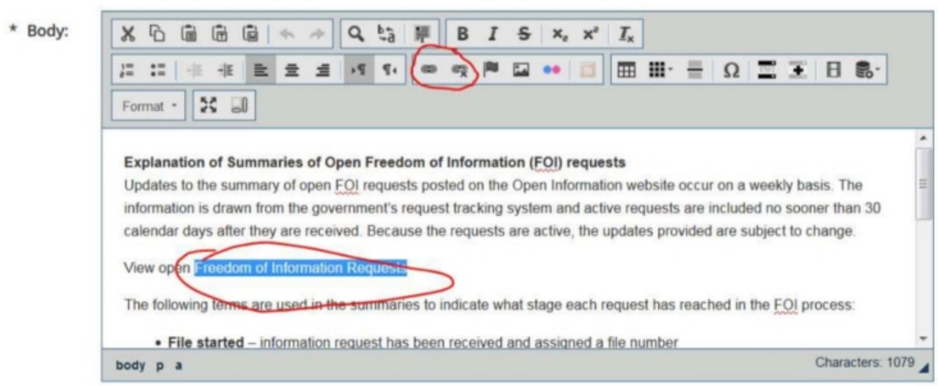
May 5, 2021
17:30

- Received from Andrew or Jamie every Thursday
- First reviewed and second review by Open Info Analysts following workflow
- Published to website following CMS Lite Procedures on Wednesday

10. From the top black ribbon click on Content.
11. In the left hand tree navigate to Province of British Columbia → Initiatives, Plans & Strategies → Open Government → Open Information → Select Open and Active Freedom of Information Requests
12. In the right hand section of the screen, click the Topic Tab



13. Scroll down to the body section, highlight the hyperlinked text "View the currently open Freedom of Information Requests" then click the break link button. Confirm file size in Open Report folder and change in the hyper Link body.
14. With the text still highlighted, click the hyperlink button.



15. In the window that pops up, click the Asset Picker button.
16. Another window will pop up. Type the file name into the search assets field (hint you can copy/paste the file name if you find it on the LAN). **Hit the TAB key.**

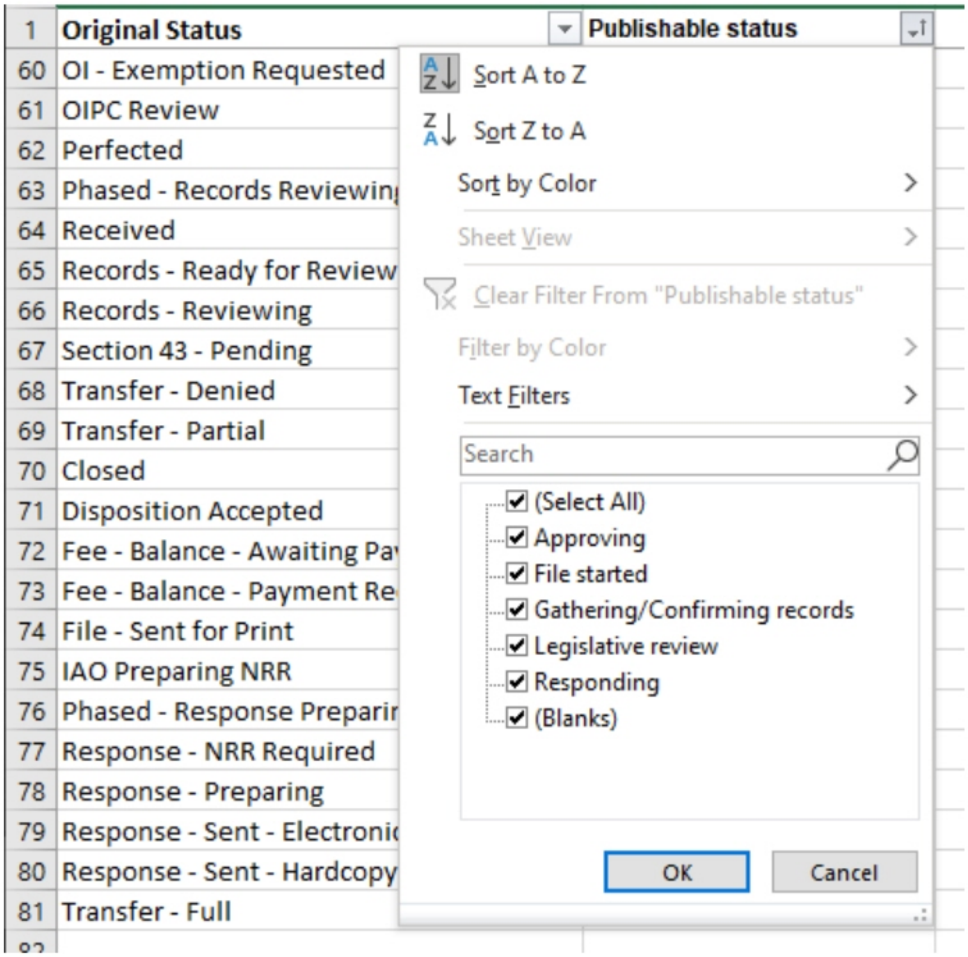
17. The asset should appear beneath the search field. Select it and click OK.
18. Click Publish.
19. Click View QA and check the link to ensure it worked.
20. Open an IE browser and navigate to the Open Info website and check the link in there too just to make sure the changes are live and working as intended. If they don't work right away, clear the browser cache, wait a few minutes and try again.
21. Go back to the Assets tab in CMS lite then un-publish and delete the file from the previous week.

Reference Docs

June 1, 2021
2:59 PM

<<Statuses for Open File Report.xlsx>>

Original Status	Publishable status
Amended	Legislative review
Assigned	File started
Call - Awaiting Further Records	Gathering/Confirming records
Call - CFR Sent	Gathering/Confirming records
Call – Deduplication in Progress	Gathering/Confirming records
Call - Fees Paid CFR Sent	Gathering/Confirming records
Call - Narrowing/Clarifying	Gathering/Confirming records
Call - Ready for CFR	Gathering/Confirming records
Call - Reminder 1	Gathering/Confirming records
Call - Reminder 2	Gathering/Confirming records
Call – Team to Review	Gathering/Confirming records
Closed	Responding
Consult - External	Legislative review
Consult - Internal	Legislative review
Consult - Third Party	Legislative review
Consult - With PA for Harms	Legislative review
Disposition Accepted	Responding
Ext - Sent	Legislative review
Fee - Balance - Awaiting Payment	Responding
Fee - Estimate - Awaiting Payment	Gathering/Confirming records
Fee - Estimate - Deposit Received	Gathering/Confirming records
Fee - Estimate - Narrowing	Gathering/Confirming records
Fee - Estimate - Payment Received	Gathering/Confirming records
Fee - Estimate - Received	Gathering/Confirming records
Fee - Estimate - Revised - Sent	Gathering/Confirming records
Fee - Estimate - Sent	Gathering/Confirming records
Fee - Waiver - Advice Sent	Legislative review
Fee - Waiver - Decision Sent	Legislative review
Fee - Waiver - Preparing Advice Form	Legislative review
Fee - Waiver - Request Received	Legislative review
File - Sent for Print	Responding
IAO Preparing NRR	Responding
IAO Preparing Sign-Off	Approving
Intake - Awaiting Clarification	Gathering/Confirming records
Intake - Awaiting Processing Instructions	Gathering/Confirming records
Intake - File Assigned to Team	File started
Intake - Section 5 Pending	Gathering/Confirming records
Intake - XGOV coordination underway	File started
OI - Exemption Approved	Legislative review
OI - Exemption Requested	Legislative review
OIPC Review	Legislative review
On Hold	Gathering/Confirming records
On Hold - Fee Related	Gathering/Confirming records
On Hold - other	Gathering/Confirming records
Peer Review	Approving
Peer Review Complete	Approving
Perfected	Legislative review
Phased - Records Reviewing	Legislative review
Phased - Response Preparing	Responding
Phased - Sign Sent	Approving
Received	Legislative review
Records - Ready for Review	Legislative review
Records - Ready to Scan	Gathering/Confirming records
Records - Reviewing	Legislative review
Records - Scanning	Gathering/Confirming records
Records - Tagging	Gathering/Confirming records
Request for Docs Sent	Gathering/Confirming records
Response - NRR Required	Responding
Response - Preparing	Responding
Response - Sent - Electronic	Responding
Response - Sent - Hardcopy	Responding
Section 43 - Pending	Legislative review
Sign - Approved	Approving
Sign - Preparing	Approving
Sign - Reminder	Approving
Sign - Sent	Approving
Sign - Sent - Revised	Approving
Transfer - Full	Responding
Transfer - Partial	Legislative review
Records - BC Mail	Gathering/Confirming records



Publishing to CMS Lite

<<CMS Lite Open Report Publishing 20220720_115738-Meeting Recording.mp4>>

Video of CMS Lite publishing process - note in the video it will mention under Content page going to "Open and Active Freedom of Information Requests"

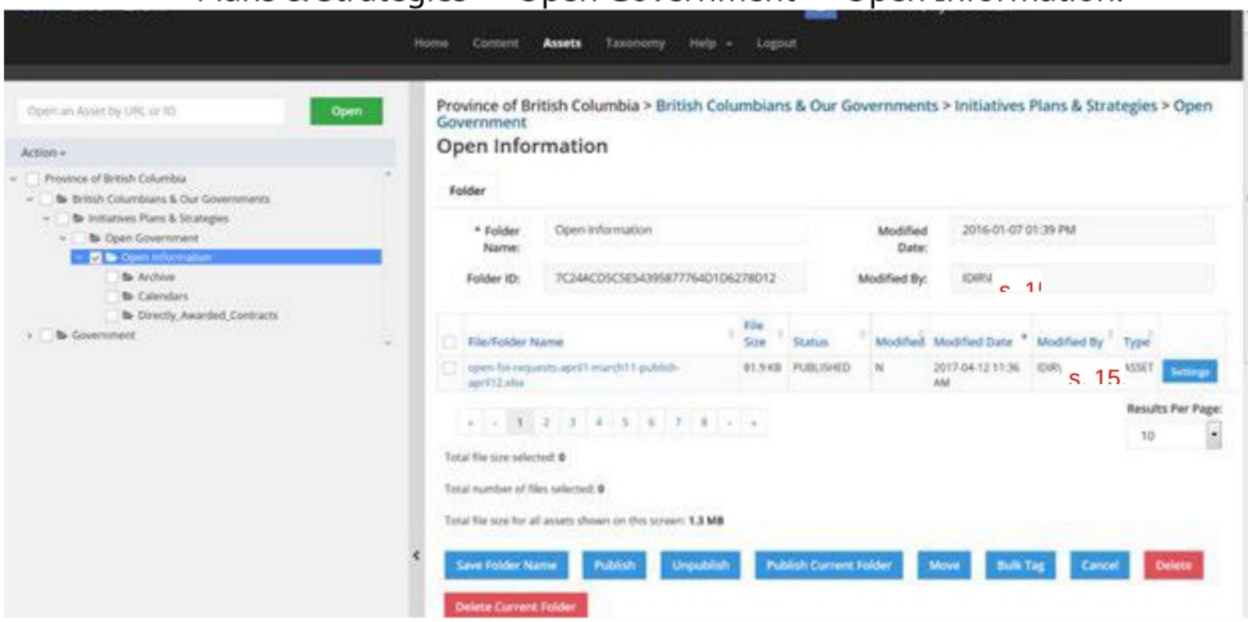
You need to click **Records Released by Request** instead

April 19, 2023
12:10 PM

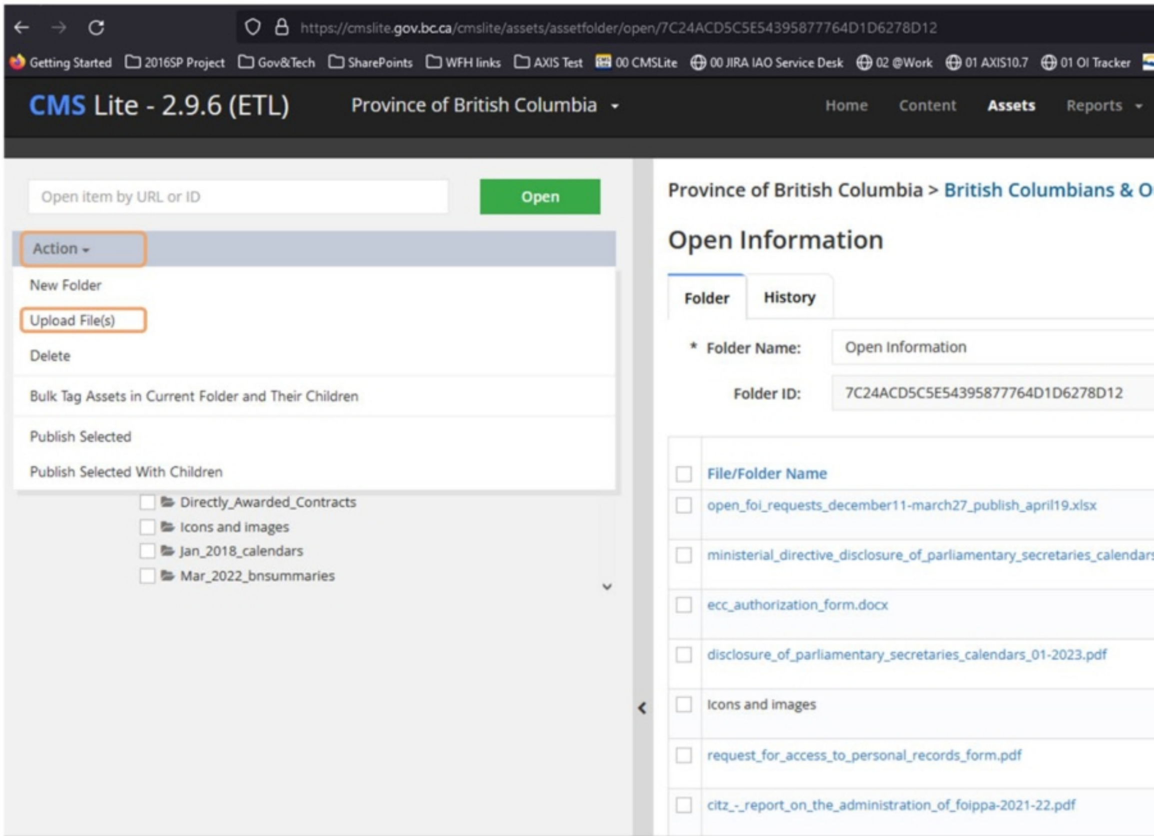
Don't forget to email the inbox when it is published.

1. Peer Review the Open Report
    1. Rename Excel Spreadsheet to "Open_FOI_Requests"
    2. Open excel, and change the Sheet name to the Date you're publishing the report on

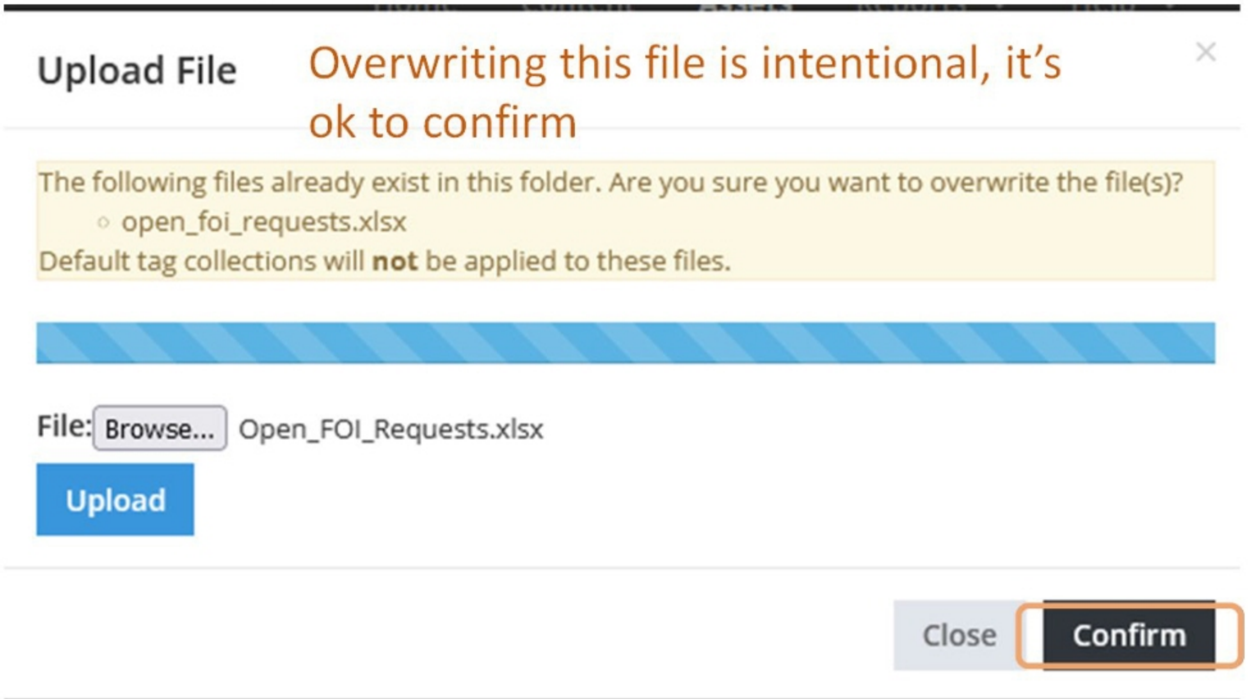
    3. Check to ensure all information is correct per the "How to Review" instructions,
    4. Under File → Info
        a. Choose Check for Issues - Inspect Document
            i. Tick all options then Inspect
                1. Clean up file based on recommendations
            ii. Save File
2. If you don't already have it, download and install Firefox web browser.
3. Navigate to: [this link] and log in.
4. Click on Assets in the top ribbon
5. On the left hand side dropdown tree navigate to Province of British Columbia → British Columbians & Our Governments → Initiatives Plans & Strategies → Open Government → Open Information.



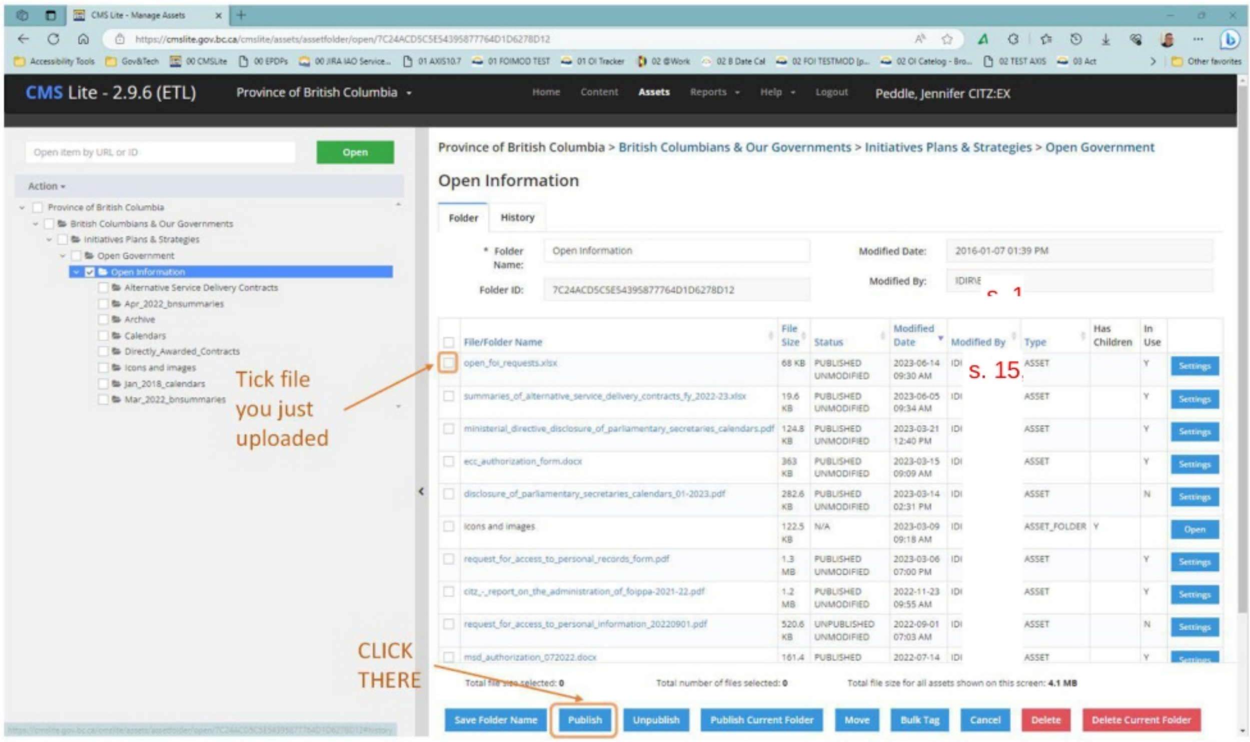
6. Click on Open Information
7. Near the top left, click on Action → Upload File(s)

1. 

8. Upload the Open Info report set for publication on that day from here.
    1. Note it will warn you that it will overwrite a file in the folder previously called that.

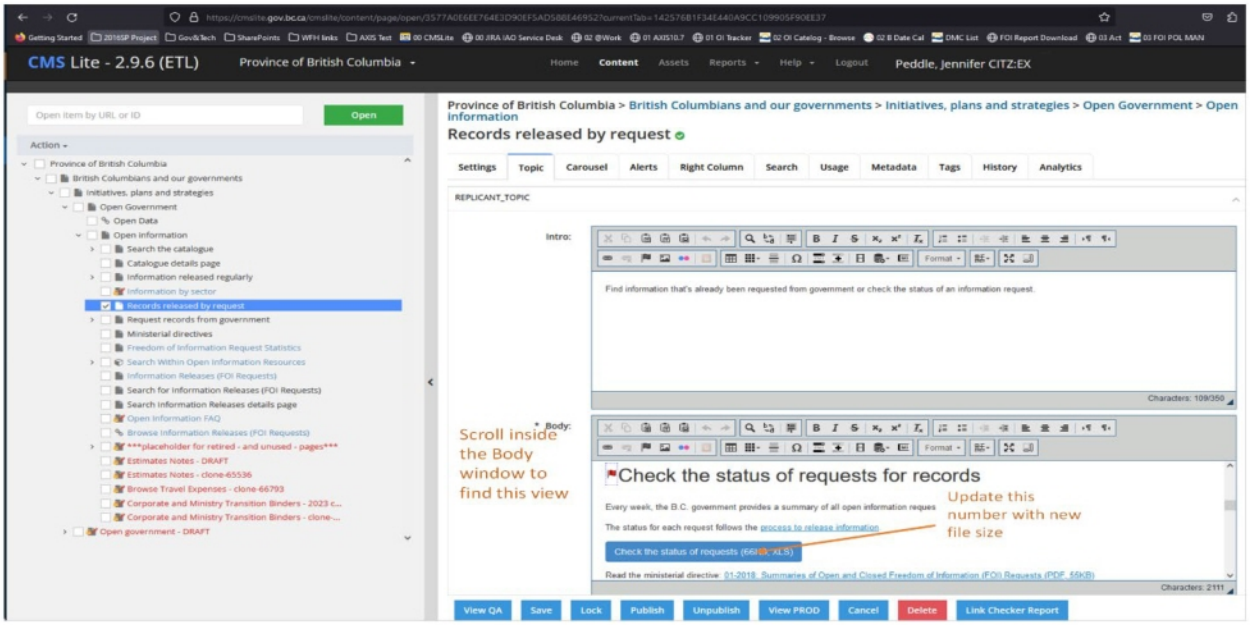


8. This is ok, it is why we named the files the same thing.
9. Select the file from the list on the right side of the screen and click publish.
   Click publish now and confirm.

11. 

12. From the top black ribbon click on **Content**.
13. In the left hand tree navigate to Province of British Columbia → Initiatives, Plans & Strategies → Open Government → Open Information → Select **Records Released by Request**
14. In the right hand section of the screen, click the Topic Tab

15. Scroll to the ***Body** section,
    1. Click inside the Area and update the Last Updated filed to Current Date.
    2. Then scroll down within this window until you see the following view "Check the status of requests for records"
       a. Update the file number inside the button to reflect the size of the newly uploaded file.



16. Click Save, then confirm saved changes, then click Publish.
    1. Tick the box for emailing when published (to receive an email that it's published)
17. Click View QA
    1. Check the publish date to ensure it's current to today
    2. Check the link to ensure it worked and the correct file downloaded
    3. Navigate to the Open Info website and check the link in there too just to make sure the changes are live and working as intended. If they don't work right away, clear the browser cache, wait a few minutes and try again. [Records released by request - Province of British Columbia (gov.bc.ca)]
18. ~~Go back to the Assets tab in CMS lite then un-publish and delete the file from the previous week.~~
    1. Unpublishing previous version is no longer necessary as we are now overwriting the previous version.
19. Log out of CMSLite and close window

BRITISH COLUMBIA

INFORMATION
ACCESS OPERATIONS
Ministry of Citizens' Services

PROACTIVE DISCLOSURE - APPROVAL FORM

Please return approval form to Open.InfoGroup@gov.bc.ca

Proactive Category:	Select Ministerial Directive
Subject Period:	Select Period , Select Fiscal Year
Public Body:	Select Public Body
Named Owner of Records: (If applicable)	

Redactions applied to the subject records must reflect exceptions permitted under the Freedom of Information and Protection of Privacy Act (FOIPPA). The below verbiage has been used where information has been severed:

Severing Verbiage	FOIPPA Section
Cabinet Confidences	12
Advice/Recommendations	13
Legal Communications	14
Security Concern	15
Intergovernmental Communications	16
Government Financial Information	17
Personal Security	19
Business Information	21
Personal Information	22

Ministry - Agreement with Recommendations		
Ministry Executive Name:	Signature:	Date:
Comments:		

Quarterly Minister Travel Expenses Escalation Process

May 31, 2021
10:17 AM

Each proactive has a due date listed in their corresponding Directive for when each summary is due to OI, and also a due date on when they are to be published on the website. *You'll notice the Directive for Quarterly Minister Travel Receipts is the only Directive that specifies approval being due to OI*, while all the other Directives just state the summaries are due and do not mention approval or sign off requirements.

Overall, I send escalation reminders via email the day *after* items are due to us. If items are not received within 3 days I 'ping' my ministry contact to inquire directly and then follow up with an email to record the correspondence. This seems to be working well, as I have not experienced late submissions for items in several months.

During holiday seasons or peak COVID waves I have proactively send reminders for upcoming due dates.

When we're reaching out to client ministries to follow up on Sign Offs, try to get the ministry to commit to a delivery date.

Quarterly Minister Travel Expenses

- Published within **30 days** after end of quarter
- **"Approval" is due to OI within 24 days after end of quarter** (they arrive pre-approved, no CFR is sent)
- We only have 3 individuals from FIN who send these summaries in to us pre-approved, this streamlines sending reminders when necessary.
  https://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/initiatives-plans-strategies/open-government/open-information/directive_4.pdf

- Day 24/25 SO Reminder email to Ministry contact - try to attain a date when we can expect it - ETA

- **Escalate to Manager Day 25/26 with a list of outstanding approvals and any ETAs provided from the Ministry so far**

Ministry:

Fiscal Year and Quarter

Start date	Contract reference number	Ministry and office, division or branch procuring the service	Name of the contractor	Initial Contract value	Current Amendment	Amended Contract value	Description of Work	Detailed Description	Delivery date	Comments (Optional, as required)	Procurement Process
Enter the date contracted services are set to begin	*Enter the contract number*	*Enter the name of your Ministry and the office, division, or branch as appropriate*	*Enter the legal name of the company, as stated in the contract*	*Enter the maximum value of the contract at the time of award (CAD exclusive of taxes)*	*Enter the amount of the amendment to the contract value in this quarter.* *Leave blank if not applicable.*	*Enter the new maximum value of the contract, inclusive of amendments (CAD exclusive of taxes).* *Leave blank if not applicable.*	*Enter the STOB Category - 2 Digit.* *E.g., enter " 60 Professional Services - Operational and Regulatory "*	*Enter title of project or a brief, 10-20 word description of the service procured.* *The description must be summarized in such a way that it does not reveal information that may or must be excepted from disclosure under Part 2 of FOIPPA. Where the entire description would be excepted, a descriptive category may be substituted (e.g., confidential legal services, confidential consulting services)*	*Enter the end date of the contract*	*Comments provide additional information about the contract, including:* *• Additional information about goods or services provided, if required;* *• Whether contract information was restated or corrected due to a factual error.* *Where an amendment has been made:* *• Note the effective date of the amendment* *• Note any other data fields effected by the amendment (e.g. Delivery Date)*	*Use CAS labelling conventions.* *E.g., enter " 100 Open competitive process "*

Ministry:

Month, Year:

CLIFF Number	Name of Minister	Subject or Title of Briefing Note	Date Started	Office, division or branch	Date Completed
Enter the Cliff number (if applicable)	*Enter the name of the Minister the note was sent to*	*Please enter the Title of the Briefing Note, if no Title exists a brief summary of the subject of the briefing note*	*Enter the date the note was sent to Minister (MMM DD,YYYY)*	*Enter the name of the office, division, or branch that created the note*	*Enter the date the note was reviewed/closed (MMM DD, YYYY)*
555555	Name	BN Title or Subject	April 1, 2022	HGJJ	April 1, 2022

Beach, Kara CITZ:EX

Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: APPROVAL REQUIRED: XXX[directive]XXX | DUE: MMM DD YYYY

MINISTRY APPROVAL REQUIRED

Ministerial Directive:	Select Ministerial Directive
Report period:	Select Period | Fiscal Year 2023/24
Ministry Approval Due Date:	**Select Date**

Thank you for providing the requested records for proactive disclosure.
The Open Information team has completed our review of the records and require approval prior to publishing.

Action Required:

1. Review the attached document(s) that identifies all content that will be redacted from the final published version.
2. Forward ministry approval to Open.InfoGroup@gov.bc.ca by the due date indicated above.
   a. For your convenience, a Proactive Disclosure Approval Form is available to you on the Open Information SharePoint site; alternatively, you may indicate your approval by replying directly to this email.
3. IF additional harms are identified during the ministry's review, please indicate the required revisions, and specify if the records are approved for publication with the requested changes, or if a second approval cycle is required by the ministry.

If you have any questions or concerns, please contact the Open Information team.

Beach, Kara CITZ:EX

Cc: CITZ OPEN INFOGROUP CITZ:EX; Pinske, James CITZ:EX; Beach, Kara CITZ:EX
Subject: Call for Records - 2022/2023 Estimate Notes | DUE: May 26 2023

Open Information
Information Access Operations

BRITISH COLUMBIA | Ministry of Citizens' Services

CALL FOR RECORDS – Estimate Notes

Ministerial Directives:	01-2020: Estimates Notes
Description:	Estimate Notes Prepared for Ministers.
Report period:	Fiscal Year: 2022/2023
Due Date:	**May 26, 2023**

Now that the final supply bill has passed, please initiate the Call for Records (CFR) process for the Proactive Disclosure of Estimate Binders Prepared for Ministers.

Action Required:

1. Create a PDF of the required records as they were provided to the Minister (Clean Copy of records).

2. Conduct a harms assessment of the records and identify any content that could be harmful to the ministry if released to the public. This includes recommended consultations. (Harms Copy of the records). Please see important considerations for the Harms Assessment within the Estimate Notes - Client Guide.
3. Upload the following items to your ministry's respective folder on the Open Information SharePoint by the due date specified above:
    a. Clean Copy of records, and
    b. Harms Copy of the records
4. Once all actions have been completed, please email Open.InfoGroup@gov.bc.ca with a CC: to James.Pinske@gov.bc.ca and Kara.Beach@gov.bc.ca to confirm that all records, harms and completed Call for Records Form are now available on the Estimate Binders SharePoint site.

What Happens Next:

Upon receipt of the required records, an assigned analyst will review the records and remove any information that requires redaction. The analyst may contact you if they have any questions about possible harms associated with the records.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact James.Pinske@gov.bc.ca or Kara.Beach@gov.bc.ca

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

To: Cope, Dan CITZ:EX
Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: Call for Records - FY2022/23 Alternative Service Delivery Contracts| DUE: APR 28 2023

Open Information
Information Access Operations

BRITISH COLUMBIA | Ministry of Citizens' Services

CALL FOR RECORDS – Alternative Service Delivery Contracts

Ministerial Directive:	08-2016: Alternative Service Delivery Contracts
Description:	Fiscal Year-To-Date Annual Summary of Alternative Service Delivery Contracts
Report period:	**Fiscal Year 2022/23**
Due Date:	**April 28, 2023**

Action Required:

1. Provide in Excel a summary of Alternative Service Delivery Contacts for the reporting period noted above.
   NOTE: Summary must be suitable for publication, as the Open Information team is unable to modify this record before release.

2. Provide the required record to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and may contact you if they have any questions. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open Information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

Cc:	CITZ OPEN INFOGROUP CITZ:EX
Subject:	Call for Records - MMM Briefing Note Summary | DUE: MMM DD YYYY
Attachments:	Template Proactive Ministerial Briefing Note CLIFF Summary.xlsx

Open Information

Information Access Operations

BRITISH COLUMBIA | Ministry of Citizens' Services

CALL FOR RECORDS – Ministerial Briefing Note Summary

Ministerial Directive:	01-2022: Summaries of Ministerial Briefing Notes
Description:	Monthly Summaries of Briefing Notes Provided to Ministers
Report period:	**January, 2023**
Due Date:	**February 15, 2023**

Action Required:

1. Complete the attached Excel template, to provide a summary of Ministerial Briefing Notes that were prepared for the reporting period noted above.
2. Conduct a harms assessment of the records to identify any content that could be harmful to the ministry if released to the public.

3. Provide the required records and harms assessment to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and remove any information that requires redaction. The analyst may contact you if they have any questions about possible harms associated with the records. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

Cc:	CITZ OPEN INFOGROUP CITZ:EX
Subject:	Call for Records - MMM Calendars | DUE: MMM DD YYYY

Open Information

Information Access Operations

BRITISH COLUMBIA

Ministry of Citizens' Services

CALL FOR RECORDS - Calendars

Ministerial Directives:	02-2016: Ministers' and Deputy Ministers' Calendars; and 01-2023: Parliamentary Secretaries' Calendars
Description:	Calendars of Ministers, Ministers of State, Parliamentary Secretaries, Deputy Ministers and Associate Deputy Ministers.
Report period: Due Date:	**January, 2023** **February 15, 2023**

Action Required:

1. Create a PDF of the required records
2. Conduct a harms assessment of the records to identify any content that could be harmful to the ministry if released to the public.

3. Provide a Clean and Harms copy of the records to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the records provided are PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and remove any information that requires redaction. The analyst may contact you if they have any questions about possible harms associated with the records. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Support material, including Best Practices and Guides are available on our SharePoint site.

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

BCDS CSD DLM GDX OCIO OCIO CIRMO OCIO CONN OCIO ES PSD RPD SBC

Beach, Kara CITZ:EX

Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: Call for Records - MMM Directly-Awarded Contracts | DUE: MMM DD YYYY
Attachments: Template Proactive Disclosure Directly Awarded Contracts (Updated).xlsx

Open Information

Information Access Operations

BRITISH COLUMBIA | Ministry of Citizens' Services

CALL FOR RECORDS – Directly-Awarded Contracts

Ministerial Directive:	03-2016: Directly-Awarded Contracts
Description:	Monthly summaries of directly-awarded contracts, excepting the following: • Cost sharing/transfer agreements entered into by the Ministry of Children and Family Development, including those with Foster Homes and Group Homes.
Report period:	**January, 2023**
Due Date:	**February 15, 2023**

Action Required:

1. Complete the attached Excel template, to provide a summary of directly awarded contracts for the reporting period noted above.

NOTE: Summary must be suitable for publication, as the Open Information team is unable to modify this record before release.

2. Provide the required record to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and may contact you if they have any questions. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: Call for Records - Quarterly Summary of Contracts with Values over $10,000 CAD | DUE: MMM DD YYYY
Attachments: Contracts Template - Updated October 2021.xlsx

Open Information
Information Access Operations

BRITISH COLUMBIA
Ministry of Citizens' Services

CALL FOR RECORDS – Summary of Contracts with Values over $10,000 CAD

Ministerial Directive:	07-2016: Summaries of Contracts with Values over $10,000 CAD
Description:	Quarterly summaries of contracts awarded under STOBs 60, 61, 63, and 80, where: a) the contract value is $10,000 or more, b) an amendment modifies the initial value of a contract to an amended contract value that is $10,000 or more, or c) an amendment valued at $10,000 or more is made to a contract. Excepting the following: • Shared Cost Arrangements entered into by the Ministry of Children and Family Development, including those with Foster Homes and Group Homes.
Report period:	**Choose an item.**

Due Date:	**January 1, 2023**

Action Required:

1. Complete the attached Excel template, to provide a summary of contracts with values over $10,000 for the reporting period noted above.
   NOTE: Summary must be suitable for publication, as the Open Information team is unable to modify this record before release.
2. Provide the required record to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and may contact you if they have any questions. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open Information website according to the schedule, as defined within the Ministerial Directive identified.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

Sent: November 16, 2023 9:25 AM
Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: OVERFDUE: Call for Records - OCT Briefing Note Summary | DUE: NOV 15 2023
Attachments: Template Proactive Ministerial Briefing Note CLIFF Summary.xlsx

Importance: High

Open Information
Information Access Operations

BRITISH COLUMBIA | Ministry of Citizens' Services

CALL FOR RECORDS – Ministerial Briefing Note Summary

Ministerial Directive:	01-2022: Summaries of Ministerial Briefing Notes
Description:	Monthly Summaries of Briefing Notes Provided to Ministers
Report period:	**October, 2023**
Due Date:	**November 15, 2023**

IF YOU HAVE ALREADY PROVIDED RECORDS AND/OR APPROVAL FOR BRIEFING NOTE PROACTIVE DISCLOSURES OR IF YOU HAVE OTHERWISE NOTIFIED OPEN INFORMATION, PLEASE ACCEPT OUR THANKS; AND IF NOT, PLEASE CONSIDER THIS EMAIL A REMINDER

Action Required:

1. Complete the attached Excel template, to provide a summary of Ministerial Briefing Notes that were prepared for the reporting period noted above.
2. Conduct a harms assessment of the records to identify any content that could be harmful to the ministry if released to the public.
3. Provide the required records and harms assessment to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and remove any information that requires redaction. The analyst may contact you if they have any questions about possible harms associated with the records. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

Beach, Kara CITZ:EX

Sent:	November 16, 2023 10:34 AM
Cc:	CITZ OPEN INFOGROUP CITZ:EX
Subject:	OVERDUE: Call for Records - OCT Directly-Awarded Contracts | DUE: NOV 15 2023
Attachments:	Template Proactive Disclosure Directly Awarded Contracts (Updated).xlsx
Importance:	High

Open Information

Information Access Operations

BRITISH COLUMBIA
Ministry of Citizens' Services

CALL FOR RECORDS – Directly-Awarded Contracts

Ministerial Directive:	03-2016: Directly-Awarded Contracts
Description:	Monthly summaries of directly-awarded contracts, excepting the following: • Cost sharing/transfer agreements entered into by the Ministry of Children and Family Development, including those with Foster Homes and Group Homes.
Report period:	**October, 2023**
Due Date:	**November 15, 2023**

*****IF YOU HAVE ALREADY PROVIDED RECORDS AND/OR APPROVAL FOR DIRECTLY AWARDED CONTRACTS PROACTIVE DISCLOSURES OR IF YOU HAVE OTHERWISE NOTIFIED OPEN INFORMATION, PLEASE ACCEPT OUR THANKS; AND IF NOT, PLEASE CONSIDER THIS EMAIL A REMINDER*****

Action Required:

1. Complete the attached Excel template, to provide a summary of directly awarded contracts for the reporting period noted above.
   NOTE: Summary must be suitable for publication, as the Open Information team is unable to modify this record before release.
2. Provide the required record to Open.InfoGroup@gov.bc.ca by the due date specified above. Please indicate in your response if the record provided is PRE-APPROVED for publishing or if you require formal ministry approval to be obtained.

What Happens Next:

Upon receipt of the required records, an assigned Open Information analyst will review the records and may contact you if they have any questions. If the records have not been provided pre-approved, the records will be sent for review/approval by your ministry approver.

Once approved, records will be published on the Open information website according to the schedule, as defined within the Ministerial Directive identified above.

Additional Information and Resources:

Ministerial Directives related to the proactive disclosure of government records are issued with authority granted under section 71.1 of the Freedom of Information and Protection of Privacy Act.

If you require additional assistance or have any questions or concerns, please contact the Open Information team.

Sincerely,

Open Information Team
Information Access Operations
Ministry of Citizens' Services

Email: Open.InfoGroup@gov.bc.ca
Web: Open Information

BCDS CSD DLM GDX OCIO OCIO CIRMO OCIO CONN OCIO ES PSD RPD SBC

Beach, Kara CITZ:EX

Cc: CITZ OPEN INFOGROUP CITZ:EX
Subject: APPROVAL REQUIRED: XXX[--DAC or 10K--]XXX | DUE: MMM DD YYYY

MINISTRY APPROVAL REQUIRED

Ministerial Directive:	Select Ministerial Directive
Report period:	Select Period | Fiscal Year 2023/24
Ministry Approval Due Date:	**Select Date**

Thank you for providing the requested records for proactive disclosure.
The Open Information team has completed our review of the records and require approval prior to publishing.

Action Required:

1. Forward ministry approval to Open.InfoGroup@gov.bc.ca by the due date indicated above.
    a. For your convenience, a Proactive Disclosure Approval Form is available to you on the Open Information SharePoint site; alternatively, you may indicate your approval by replying directly to this email.

If you have any questions or concerns, please contact the Open Information team.

Proactive Disclosure of Executive Calendars

CLIENT GUIDE

Key Facts:

Ministerial Directives	[02-2016: Ministers' and Deputy Ministers' Calendars] [01-2023: Parliamentary Secretaries' Calendars]
Authority	Section 71.1 of the Freedom of Information and Protection of Privacy Act
Summary	The Ministerial Directives refenced above defines the required proactive disclosure of calendars by Ministers, Ministers of State, Parliamentary Secretaries, Deputy Ministers and Associate Deputy Ministers
Reporting Period	Monthly
Publishing Cycle	Records are published monthly, 45 calendar days following the period in which they relate. i.e. Calendar records for the month of March are published May 15th.

Process:

1. Call For Records (CFR)

The Open Information team distributes a "Call for Records" (CFR) via email to all ministry clients on the 1st of each month. Records must be provided to the Open Information team within 10 days, as indicated by the CFR due date under the authority of the Ministerial Directive.

The CFR distribution list for Ministers' and Deputy Ministers' Calendars is named "CITZ OI CALENDAR CFR" and can be viewed in the Global Address List (GAL). If your ministry requires any updates to this distribution list, please contact the Open Information team at open.infogroup@gov.bc.ca.

2. Records prepared by Ministry

The Ministry delegate performs a harms assessment on the subject records and produces a "Clean" and "Harms" copy of the records which are provided to the

Open Information team as instructed within the CFR. For additional guidance, please see: Preparing Records:

3. Records reviewed by Open Information

The assigned Open Information analyst reviews the records along with the harms assessment provided by the ministry. The analyst will produce a "Redline" version of the document that reflects the ministry's requested severing, where permitted, and may include additional redaction as required. Within the "Redline" version, all content is visible with red redaction boxes that highlight the content that will be removed from the published version. The analyst may contact the ministry if additional clarification is required on any of the identified harms.

Records are delivered to the ministry for final approval which is typically due within 10 business days. The specific due date will be clearly communicated to the ministry within the sign off package.

4. Ministry approves records for publication

The Ministry reviews the "Redline" version of the records and coordinates ministry approval from the public body head or delegated authority.

Ministry approval is provided to the Open Information team via the approval form provided within the sign off package or by email.

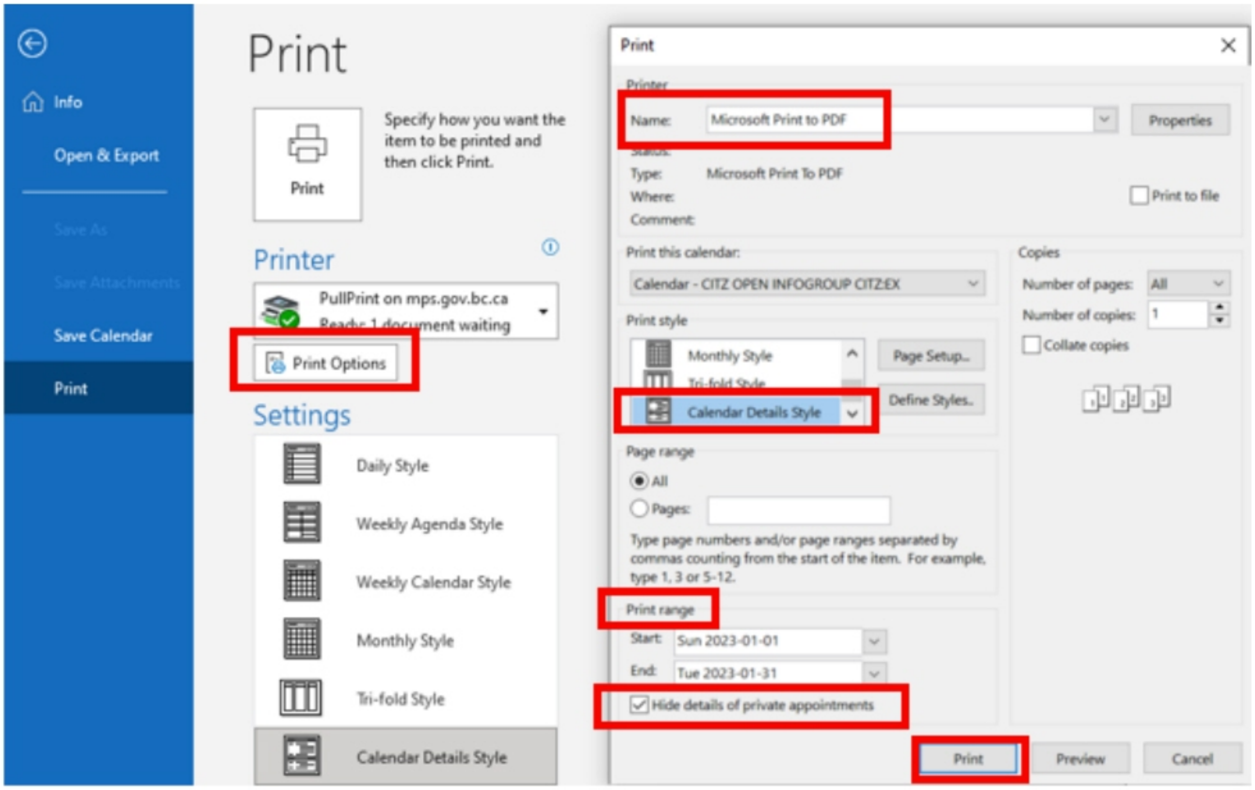
5. Records published to the Open Information website

The Open Information team prepares the final "Redacted" version of the records for publication. All ministry calendar records are published in a batch according to the publication schedule defined within the Ministerial Directive.

Preparing Records:

1. Produce a PDF of the calendar records

a) Within Outlook, navigate to the required calendar
b) Select File > Print > Print Options
c) Set Print Options To:
    a. Printer: Microsoft Print to PDF
    b. Print Style: Calendar Details Style
    c. Print Range: input date range to capture the entire calendar month
    d. Check the box to "Hide details of private appointments"
d) Select Print
e) Save PDF



** For minister's calendars, produce only the minister's calendar; Specific MLA or constituency-related duties need not be included.*

2. Conduct a harms assessment

a) Prepare and attach one clean copy of the records (no marks, handwritten notes, sticky notes or highlighting);

b) Prepare and attach a separate copy of the records and identify all instances of:

- Personal information
- Cabinet or Treasury Board entries. IAO needs to know if the entry pertains to an item that was prepared for cabinet/treasury board and if it ever went, or will go, to Cabinet or Treasury Board.
- Legal advice or entries that might reveal solicitor-client privilege
- Other content where public disclosure could cause the ministry harm

Severing Verbiage:

Redactions on released material must reflect exceptions permitted under the Freedom of Information and Protection of Privacy Act (FOIPPA). The below verbiage will be used by the Open Information team when publishing the records:

Severing Verbiage	FOIPPA Section
Cabinet Confidence	12
Advice/Recommendations	13
Legal Communications	14
Security Concern	15
Intergovernmental Communications	16
Government Financial Information	17
Personal Security	19
Business Information	21
Personal Information	22

Best Practices:

1. The owner's calendar must reflect all government business that occurred during the reporting period. Monday to Sunday, 24 hours/day.

2. Use a separate calendar to record MLA or constituency related duties. If the owner chooses to include MLA entries in the same calendar for disclosure, MLA entries will be released with exception to specific identified harms.

3. Do not sever non personal information out of a calendar. The Open Information team reviews all ministry identified harms and will apply redactions as permitted.

4. For calendar entries that reference subject matter from a different public body AND where the calendar owner is unable to confidently assess harm, the calendar owner (or delegate) should contact the applicable public body for an opinion of harm. In instances where this may not be possible, please identify the gap in your harms assessment.

5. Avoid the use of any personal or editorializing comments when making calendar entries.

6. Be clear about the subject of the meeting and who is expected to attend.

7. Keep the meeting subject concise. More information may lead to unnecessary redaction.
    a. EXAMPLES:
        i. "Meeting with John Smith, EFO, on Citizen Engagement"
        ii. "Meeting with John Smith, EFO, re: cabinet submission on Citizen engagement"
        iii. Example (i) above can likely be released in full, while example (ii) may require redaction and could lead to additional follow up by the Open Information team with the calendar owner or the Office of the Premier, for further information.

8. Mark personal appointments as "Private" to block event details from being included in the printed record and avoid the need to sever.
    a. Caution: Ensure that only personal appointments are marked as private. Calendar records must be accurate and are subject to a formal access request under FOIPPA.

9. To promote accuracy and completeness, the calendar record should always be current by updating the calendar as changes occur.
    a. EXAMPLES:
        i. Delete meetings that did not occur, or where the calendar owner (or their representative) did not attend;
        ii. Where someone else attended on behalf of the calendar owner, update the calendar to record the names and titles of the individual(s) who actually attended the meeting as the calendar owner's representative.

10. Calendar entries should be for the calendar owner only. Do not create calendar entries for other individuals in the same calendar unless they are acting on behalf of the calendar owner.

11. Vacation entries should avoid the use of personal information or be marked as a private event. Please be aware that most vacation entries will be released in full. Exceptions include instances where an address or personal 3rd party details are provided in the entry.

12. Calendars should be maintained when the calendar owner is on leave or otherwise absent.
    a. EXAMPLE:
        i. Where the absent calendar owner is invited to a meeting or event and someone else attends on the calendar owner’s behalf, this meeting or event should be recorded in the calendar indicating who attended.

13. When a calendar owner moves to a new position, please ensure a separate record is produced to clearly reflect the distinction between the two positions.
    a. EXAMPLE:
        i. ADM Joe Smith moves from Ministry of Finance to Ministry of Forests on Dec 4. A calendar record for Joe Smith must be produced for Dec 1 – Dec 3, AND Dec 4 – Dec 31. The outgoing ministry should produce the calendar record on the calendar owner’s last day. This avoids the incoming ministry’s need to request a consultation for entries related to the owner's former position.

Additional Resources:

Freedom of Information and Protection of Privacy Act	Complete copy of the Act
Freedom of Information and Protection of Privacy Regulation	Complete copy of the FOIPPA Regulations
FOIPPA Policy & Procedures Manual	Reference tool that provides an overview of the Act's general requirements, specific provisions, and application examples.
Ministerial Directives	List of all Ministerial Directives related to Proactive Disclosure.

Glossary of Terms:

Clean Copy	The original version of the record with no redaction or identified harms. This version is produced by the Ministry.
Harms Copy (or Marked Copy)	The version of the record that identifies content contained within the record that could be harmful to the ministry if released to the public. This version is produced by the Ministry.
Redline Copy	The version of the record that identifies content to be redacted before public release. Content to be redacted is contained within a red border. In this version the content to be redacted remains visible and is used to obtain final ministry approval. This version is produced by IAO.
Redaction Copy	The version of the record that is published on the Open Information website. Content that was identified with a red border in the Redline copy will be redacted with a solid white box. This version is produced by IAO.

Proactive Disclosure of Estimate Notes

CLIENT GUIDE

Key Facts:

Ministerial Directives	01-2020: Estimates Notes
Authority	Section 71.1 of the Freedom of Information and Protection of Privacy Act
Summary	The Ministerial Directives refenced above defines the required proactive disclosure of Estimate Notes Prepared for Ministers.
Reporting Period	Annual
Publishing Cycle	Records are published monthly, 120 calendar days following the passing of the Final Supply Bill.

Harms Assessment:

Established categories of records released under proactive disclosure provide an opportunity to provide corporate consistency in the way that information is released. IAO will be working towards a consistent, transparent approach in the disclosure of Estimates Notes.

To facilitate a consistent, transparent approach, ministries should note the following:

- Directive 01-2020 relates only to Estimates Notes prepared for Ministers.

- Estimates Notes should be prepared in a way that meets business needs and prepares the Minister for the estimates process but should also consider that they will be proactively disclosed upon conclusion of estimates sessions.

- Estimates notes are drafted with the intent of being discussed during a live and publicly documented forum. In particular, key messages are written for the Minister to voice publicly and should be released in full.

- Budget-related records for estimates should not include information that would be subject to severing for financial harm or cabinet confidence.

- Information that would result in mandatory exceptions to disclosure (e.g., solicitor-client privilege, personal information, cabinet confidence) should be kept to a minimum in estimates notes.

- Severing related to discretionary exceptions (e.g., policy advice and recommendations) should only be applied where there is an actual risk of harm. Estimates is a public process and ministries should err on the side of transparency through proactive disclosure.

- Information included in background or key facts sections is factual and suitable to be released publicly. To facilitate proactive disclosure, you may consider grouping more confidential/sensitive information in particular sections.

- Potential questions and answers that are prepared for the Minister in advance can be considered as recommendations if they are not used, but only if they would result in harm to the ministry if disclosed.

Severing Verbiage:

Redactions on released material must reflect exceptions permitted under the Freedom of Information and Protection of Privacy Act (FOIPPA). The below verbiage will be used by the Open Information team when publishing the records:

Severing Verbiage	FOIPPA Section
Cabinet Confidence	12
Advice/Recommendations	13
Legal Communications	14
Security Concern	15
Intergovernmental Communications	16
Government Financial Information	17
Personal Security	19
Business Information	21
Personal Information	22

Additional Resources:

Freedom of Information and Protection of Privacy Act	Complete copy of the Act
Freedom of Information and Protection of Privacy Regulation	Complete copy of the FOIPPA Regulations
FOIPPA Policy & Procedures Manual	Reference tool that provides an overview of the Act's general requirements, specific provisions, and application examples.
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Glossary of Terms:

Clean Copy	The original version of the record with no redaction or identified harms. This version is produced by the Ministry.
Harms Copy (or Marked Copy)	The version of the record that identifies content contained within the record that could be harmful to the ministry if released to the public. This version is produced by the Ministry.
Redline Copy	The version of the record that identifies content to be redacted before public release. Content to be redacted is contained within a red border. In this version the content to be redacted remains visible and is used to obtain final ministry approval. This version is produced by IAO.
Redacted Copy	The version of the record that is published on the Open Information website. Content that was identified with a red border in the Redline copy will be redacted with a solid white box. This version is produced by IAO.

2022 Transition / Corporate Binders Project

September 27, 2022
5:00 PM

Manager:	James Pinske
Project Lead:	Kara Beach

Resources/Tools:

MS Teams Channel - Transition Binder Project
SharePoint - Proactive Disclosure
Open Info Website - Transition Binders
AXIS - PROAC-2022-20039 (Parent file)

Ministerial Directives:

- 02-2020: Corporate Transition Binder
- 03-2020: Ministers' Transition Binders

From <https://www2.gov.bc.ca/gov/content/governments/about-the-bc-government/open-government/open-information/freedom-of-information/ministerial-directives-proactive-releases>

Assignments:

Ministry	Analyst	Axis File for Correspondence Parent: PROAC-2022-20039
Attorney General and Minister responsible for Housing		MAG-2022-20043
Agriculture and Food		AGR-2022-20042
Children and Family Development		CFD-2022-20044
Citizens' Services		CTZ-2022-20045

Crown Agencies Secretariat		CAS-2022-20047
Declaration Act Secretariat		DAS-2022-20071
Education and Child Care		EDU-2022-20048
Emergency Management and Climate Readiness		EMC-2022-20073
Energy, Mines and Low Carbon Innovation		EML-2022-20049
Environment and Climate Change Strategy		MOE-2022-20050
Finance		FIN-2022-20051
Forests		FOR-2022-20052
Government Communications and Public Engagement		GCP-2022-20053
Health		HTH-2022-20055
Housing		HSG-2022-20072
Indigenous Relations and Reconciliation		IRR-2022-20056
Jobs, Economic Development and Innovation		JER-2022-20058
Labour		LBR-2022-20059
Mental Health and Addictions		MHA-2022-20061
Municipal Affairs		MMA-2022-20062
Office of the Premier		OOP-2022-20063
Post-Secondary Education and Future Skills		AED-2022-20041
Public Service Agency		PSA-2022-20064
Public Safety and Solicitor General		PSS-2022-20067
Social Development and Poverty Reduction		MSD-2022-20068
Tourism, Arts, Culture and Sport		TAC-2022-20069
Transportation and Infrastructure		TRA-2022-20070
Water, Land and Resource Stewardship		LWR-2022-20060

ACTION: Analysts to claim/assign Axis files noted above
\\

Project Schedule

November 14, 2022
1:59 PM

Date Completed	Task	Bus Days	Compared to Estimates	Responsibility
Dec 7	New Cabinet Sworn In (estimated date)			
Dec 7	CFR sent	1	1	IAO
Dec 22	all records received and harms assessed	11	15	ministries
Jan 5	all consultations identified and sent out	7	9	IAO
Jan 18	all consultations completed	9	16	ministries
Jan 26	Finalize redline (3 day) and Peer Review (3 days)	6	0	IAO
Feb 9	ministry approvals completed	10	18	ministries
Feb 15	Review for consistency	4	0	IAO
Feb 27	OOP approval completed	7	9	Premier's Office
Mar 2	Open Information review and final checks	3	6	IAO
Mar 3	Prep for Publishing Complete	1	9	IMB/IAO
Mar 6	Transition Notes posted online to OI	1	1	IMB/IAO
	TOTAL	60 (20/40) (32%/69%)	84 (26/58) (31%/69%)	

Prep prior to Cabinet being Sworn In

November 16, 2022
12:52 PM

Page in Progress********

Create jira ticket with IMB to schedule publication support in applicable sprint

Done: CA-445

Email AXIS Support CITZ:EX <AXIS.Support@gov.bc.ca> to have new Axis File Cabinet added (i.e 2022 Transition Binders)
Done.

Ministry Comms

November 16, 2022
2:38 PM

List of Ministry contacts is maintained in the MS Teams channel: Transition Binder Project.
Ministry Contacts - Transition Binders

<<UPDATE -- Project Schedule - Proactive Disclosure of Transition Binders.msg>>

Pinske, James CITZ:EX

From:	Pinske, James CITZ:EX
Sent:	November 10, 2022 3:00 PM
To:	OOP FOI PREM:EX; IGRS FOI IGRS:EX; Hawkins, Brittany PREM:EX; Allen, Jackie PREM:EX; AEST FOI Coordinator AEST:EX; AG PSSG FOI Coordinator AG:EX; Skogstad, Holly AG:EX; Latzel, Teresa HLTH:EX; Lyttle, Shawna AF:EX; Bathea, Kenna MCF:EX; Biggs, Jackie CITZ:EX; CITZ FOI Requests CITZ:EX; Kennedy, Karla 1 ECC:EX; ECC FOI ECC:EX; Crockett, Janine EMLI:EX; EMLI FOI EMLI:EX; Ronda, Haley ENV:EX; Tomczynski, Martyna LWRS:EX; ENV Information Management Team ENV:EX; FOI Coordinator FIN:EX; Morgan, Melissa FIN:EX; Michell, Jennifer FIN:EX; Callow, Debbie FIN:EX; Faust, Marnie L GCPE:EX; Liu, Susan GCPE:EX; Korchinski, Jaime PSA:EX; Wells, Katrina PSA:EX; FOR FOI FOR:EX; Wood, Andrea D FOR:EX; HLTH FOI Operations HLTH:EX; Shust, Susan D HLTH:EX; Moulton, Holly HLTH:EX; Murray, Heather HLTH:EX; IRR FOI IRR:EX; Ponchet, Kim IRR:EX; FOI Economy Sector MUNI:EX; Kavadas, Alexandra MUNI:EX; Padgett, David MUNI:EX; Hudson, Vicki MUNI:EX; Hourston, Sveah LBR:EX; Nelson, Shirley D MUNI:EX; LWRS FOI LWRS:EX; Workman, Nicholas LWRS:EX; Casanova, Tamara MMHA:EX; Milne, Karen IGRS:EX; Plamondon, Lea TRAN:EX
Cc:	Beach, Kara CITZ:EX; Onciul, Jamie CITZ:EX; Kane, Meghan M CITZ:EX; Begley, Rhianna CITZ:EX; CITZ OPEN INFOGROUP CITZ:EX; Pinske, James CITZ:EX
Subject:	UPDATE -- Project Schedule - Proactive Disclosure of Transition Binders
Importance:	High

Good afternoon,

As recently announced, **December 7, 2022** has been confirmed as the date that the new Cabinet will be sworn into office. This date will represent the trigger for all ministries to proactively disclose their respective Transition Binders within 90 calendar days. These obligations are defined in ministerial directives: 02-2020: Corporate Transition Binder and 03-2020: Ministers' Transition Binders.

As noted in my original communication, IAO will be coordinating the publishing of the Transition Binders. Please see the updated Project timeline with important dates and considerations below.

What to Expect Next

- On December 7, 2022, you will receive a Call for Records from the Open Information team. Each ministry will have 11 business days to provide the records, including a Harms copy, to Open Information by **December 22, 2022**.
  - The disclosure requirement continues to apply in the event that your current minister or ministry does not change. As such, ALL prepared Transition Binders are required to be proactively disclosed.
  - To ensure the quality of published records, we will be requesting original digital copies. Scanned versions should be avoided where possible.

Overall Project Timeline

2. If the contacts for your Ministry (or sector), contained within this distribution, do not reflect the contacts that you would like engaged for the Transition Binder project, please provide me with the required updates. (please do not reply all)

Thank you in advance, I am looking forward to connecting with you further in the fall.

Regards,

James Pinske
Manager, Consolidated Intake and Open Information
Information Access Operations | Ministry of Citizens' Services

Phone: 778.698.3023
PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

Date Completed	Project Deliverable	Responsibility
7-DEC-2022	PROJECT TRIGGER: New Cabinet Sworn In	
7-DEC-2022	CFR sent	IAO
22-DEC-22	All records received and harms assessed	ministries
5-JAN-2023	All consultations identified and sent out	IAO
18-JAN-2023	All consultations completed	Ministries
26-JAN-2023	Finalize redline and Peer Review	IAO
9-FEB-2023	Ministry approvals completed	Ministries
27-FEB-2023	OOP approval completed	Premier's Office
2-MAR-2023	Open Information review and final checks	IAO
3-MAR-2023	Prep for Publishing Complete	IMB/IAO
6-MAR-2022	Transition Notes posted online to OI	IMB/IAO

Considerations

- Please note that this project will extend through the December holiday season. Due to the tight timeline, it is imperative that planned vacation is identified at the start of the project with appropriate backups (with sufficient authority) identified to IAO as early as possible.

- All consultations must be completed between Jan 6, and Jan 18, 2023. Unfortunately the tight project timeline cannot accommodate any extensions. As such, **any pending consultations will be deemed complete on January 18, 2023.**

- It is encouraged that each ministry schedule placeholder meetings with the respective Public Body Heads or delegated authorities now, to ensure sufficient time is available for the required review and sign off processes. As indicated in the project timeline, each ministry will receive their respective package by end of day, January 26, 2023. **Final Ministry approval must be completed by February 9, 2023 in order to give Office of the Premier time to review and approve all material.**

Project Contacts

If at anytime, you have questions or concerns regarding this project, please contact the Project Lead, Kara Beach TL Open Information, or myself. This communication has been distributed to the ministry contact list that was validated in September. If your ministry requires any changes to the project distribution list, please let us know.

Thank you for your effort and continued dedication to ensure we meet our public obligations for proactive disclosure.

Regards,

James Pinske
Manager, Innovation and Open Information
Information Access Operations | Ministry of Citizens' Services

Phone: 778.698.3023
PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

From: Pinske, James CITZ:EX <James.Pinske@gov.bc.ca>
Sent: November 1, 2022 12:45 PM
To: OOP FOI PREM:EX <OOP.FOI@gov.bc.ca>; IGRS FOI IGRS:EX <IGRS.FOI@gov.bc.ca>; Hawkins, Brittany PREM:EX <Brittany.Hawkins@gov.bc.ca>; Allen, Jackie PREM:EX <Jackie.Allen@gov.bc.ca>; AEST FOI Coordinator AEST:EX <AEST.FOICoordinator@gov.bc.ca>; AG PSSG FOI Coordinator AG:EX <AGPSSG.FOICoordinator@gov.bc.ca>; Skogstad, Holly AG:EX <Holly.Skogstad@gov.bc.ca>; Latzel, Teresa HLTH:EX <Teresa.Latzel@gov.bc.ca>; Lyttle, Shawna AF:EX <Shawna.Lyttle@gov.bc.ca>; Bathea, Kenna MCF:EX <Kenna.Bathea@gov.bc.ca>; Biggs, Jackie CITZ:EX <Jackie.Biggs@gov.bc.ca>; CITZ FOI Requests CITZ:EX <CITZ.FOIRequests@gov.bc.ca>; Kennedy, Karla 1 ECC:EX <Karla.1.Kennedy@gov.bc.ca>; ECC FOI ECC:EX <EDUC.FOI@gov.bc.ca>; Crockett, Janine EMLI:EX <Janine.Crockett@gov.bc.ca>; EMLI FOI EMLI:EX <MEM.FOI@gov.bc.ca>; Ronda, Haley ENV:EX <Haley.Ronda@gov.bc.ca>; Tomczynski, Martyna LWRS:EX <Martyna.Tomczynski@gov.bc.ca>; ENV Information Management Team ENV:EX <ENV.DMO.IRM@gov.bc.ca>; FOI Coordinator FIN:EX <FOI.Coordinator@gov.bc.ca>; Morgan, Melissa FIN:EX <Melissa.Morgan@gov.bc.ca>; Michell, Jennifer FIN:EX <Jennifer.Michell@gov.bc.ca>; Callow, Debbie FIN:EX <Debbie.Callow@gov.bc.ca>; Faust, Marnie L GCPE:EX <Marnie.Faust@gov.bc.ca>; Liu, Susan GCPE:EX <Susan.Liu@gov.bc.ca>; Korchinski, Jaime PSA:EX <Jaime.Korchinski@gov.bc.ca>; Wells, Katrina PSA:EX <Katrina.Wells@gov.bc.ca>; FOR FOI FOR:EX <flnr.foi@gov.bc.ca>; Wood, Andrea D FOR:EX <Andrea.Wood@gov.bc.ca>; HLTH FOI Operations HLTH:EX <HLTH.FOIOperations@gov.bc.ca>; Shust, Susan D HLTH:EX <Susan.Shust@gov.bc.ca>; Moulton, Holly HLTH:EX <Holly.Moulton@gov.bc.ca>; Murray, Heather HLTH:EX <Heather.Murray@gov.bc.ca>; IRR FOI IRR:EX <IRRFOI@gov.bc.ca>; Ponchet, Kim IRR:EX <Kim.Ponchet@gov.bc.ca>; FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>; Kavadas, Alexandra MUNI:EX <Alexandra.Kavadas@gov.bc.ca>; Padgett, David MUNI:EX <David.Padgett@gov.bc.ca>; Hudson, Vicki MUNI:EX <Vicki.Hudson@gov.bc.ca>; Hourston, Sveah LBR:EX <Sveah.Hourston@gov.bc.ca>; Nelson, Shirley D MUNI:EX <Shirley.Nelson@gov.bc.ca>; LWRS FOI LWRS:EX <lwrs.foi@gov.bc.ca>; Workman, Nicholas LWRS:EX <Nicholas.Workman@gov.bc.ca>; Casanova, Tamara MMHA:EX <Tamara.Casanova@gov.bc.ca>; Milne, Karen IGRS:EX <Karen.Milne@gov.bc.ca>; Plamondon, Lea TRAN:EX <Lea.Plamondon@gov.bc.ca>
Cc: Beach, Kara CITZ:EX <Kara.Beach@gov.bc.ca>; Onciul, Jamie CITZ:EX <Jamie.Onciul@gov.bc.ca>; Kane, Meghan M CITZ:EX <Meghan.Kane@gov.bc.ca>; Begley, Rhianna CITZ:EX <Rhianna.Begley@gov.bc.ca>; CITZ OPEN INFOGROUP CITZ:EX <Open.InfoGroup@gov.bc.ca>; Pinske, James CITZ:EX <James.Pinske@gov.bc.ca>
Subject: RE: Project Schedule - Proactive Disclosure of Transition Binders

Good afternoon, please be advised that we have been informed that the swearing in of a new Cabinet will take place on a different date following the swearing in of the new Premier.

It is the swearing in of a new Cabinet, not the Premier, that will trigger the 90 calendar day deadline to publish the Corporate and Minister Transition Binders. This will impact the tentative project schedule that was originally shared. While we do not currently have the confirmed date that the new Cabinet will be sworn in, we will provide the updated project schedule as soon as that date becomes known.

Apologies for the original communication and any confusion.

Regards,

James Pinske
Manager, Innovation and Open Information
Information Access Operations | Ministry of Citizens' Services

Phone: 778.698.3023
PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

From: Pinske, James CITZ:EX <James.Pinske@gov.bc.ca>
Sent: October 28, 2022 10:36 AM
To: OOP FOI PREM:EX <OOP.FOI@gov.bc.ca>; IGRS FOI IGRS:EX <IGRS.FOI@gov.bc.ca>; Hawkins, Brittany PREM:EX <Brittany.Hawkins@gov.bc.ca>; Allen, Jackie PREM:EX <Jackie.Allen@gov.bc.ca>; AEST FOI Coordinator AEST:EX <AEST.FOICoordinator@gov.bc.ca>; AG PSSG FOI Coordinator AG:EX <AGPSSG.FOICoordinator@gov.bc.ca>; Skogstad, Holly AG:EX <Holly.Skogstad@gov.bc.ca>; Latzel, Teresa HLTH:EX <Teresa.Latzel@gov.bc.ca>; Lyttle, Shawna AF:EX <Shawna.Lyttle@gov.bc.ca>; Bathea, Kenna MCF:EX <Kenna.Bathea@gov.bc.ca>; Biggs, Jackie CITZ:EX <Jackie.Biggs@gov.bc.ca>; CITZ FOI Requests CITZ:EX <CITZ.FOIRequests@gov.bc.ca>; Kennedy, Karla 1 ECC:EX <Karla.1.Kennedy@gov.bc.ca>; ECC FOI ECC:EX <EDUC.FOI@gov.bc.ca>; Crockett, Janine EMLI:EX <Janine.Crockett@gov.bc.ca>; EMLI FOI EMLI:EX <MEM.FOI@gov.bc.ca>; Ronda, Haley ENV:EX <Haley.Ronda@gov.bc.ca>; Tomczynski, Martyna LWRS:EX <Martyna.Tomczynski@gov.bc.ca>; ENV Information Management Team ENV:EX <ENV.DMO.IRM@gov.bc.ca>; FOI Coordinator FIN:EX <FOI.Coordinator@gov.bc.ca>; Morgan, Melissa FIN:EX <Melissa.Morgan@gov.bc.ca>; Michell, Jennifer FIN:EX <Jennifer.Michell@gov.bc.ca>; Callow, Debbie FIN:EX <Debbie.Callow@gov.bc.ca>; Faust, Marnie L GCPE:EX <Marnie.Faust@gov.bc.ca>; Liu, Susan GCPE:EX <Susan.Liu@gov.bc.ca>; Korchinski, Jaime PSA:EX <Jaime.Korchinski@gov.bc.ca>; Wells, Katrina PSA:EX <Katrina.Wells@gov.bc.ca>; FOR FOI FOR:EX <flnr.foi@gov.bc.ca>; Wood, Andrea D FOR:EX <Andrea.Wood@gov.bc.ca>; HLTH FOI Operations HLTH:EX <HLTH.FOIOperations@gov.bc.ca>; Shust, Susan D HLTH:EX <Susan.Shust@gov.bc.ca>; Moulton, Holly HLTH:EX <Holly.Moulton@gov.bc.ca>; Murray, Heather HLTH:EX <Heather.Murray@gov.bc.ca>; IRR FOI IRR:EX <IRRFOI@gov.bc.ca>; Ponchet, Kim IRR:EX <Kim.Ponchet@gov.bc.ca>; FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>; Kavadas, Alexandra MUNI:EX <Alexandra.Kavadas@gov.bc.ca>; Padgett, David MUNI:EX <David.Padgett@gov.bc.ca>; Hudson, Vicki MUNI:EX <Vicki.Hudson@gov.bc.ca>; Hourston, Sveah LBR:EX <Sveah.Hourston@gov.bc.ca>; Nelson, Shirley D MUNI:EX <Shirley.Nelson@gov.bc.ca>; LWRS FOI LWRS:EX <lwrs.foi@gov.bc.ca>; Workman, Nicholas LWRS:EX <Nicholas.Workman@gov.bc.ca>; Casanova, Tamara MMHA:EX <Tamara.Casanova@gov.bc.ca>; Milne, Karen IGRS:EX <Karen.Milne@gov.bc.ca>; Plamondon, Lea TRAN:EX <Lea.Plamondon@gov.bc.ca>
Cc: Beach, Kara CITZ:EX <Kara.Beach@gov.bc.ca>; Pinske, James CITZ:EX <James.Pinske@gov.bc.ca>; Onciul, Jamie CITZ:EX <Jamie.Onciul@gov.bc.ca>; Kane, Meghan M CITZ:EX <Meghan.Kane@gov.bc.ca>; Begley, Rhianna CITZ:EX <Rhianna.Begley@gov.bc.ca>; CITZ OPEN INFOGROUP CITZ:EX <Open.InfoGroup@gov.bc.ca>
Subject: Project Schedule - Proactive Disclosure of Transition Binders
Importance: High

Good morning, as per the news release yesterday, the New premier will be sworn in Nov. 18 | BC Gov News. The swearing in of the new cabinet will trigger the requirement to proactively disclose all Transition Binders within 90 calendar days, per ministerial directives:

- 02-2020: Corporate Transition Binder
- 03-2020: Ministers' Transition Binders

IAO will be coordinating the publishing of the Transition Binders. We will be applying lessons learned from the recently concluded Estimates Notes project, so you may observe some differences in the process. Please also be aware that we were allocated 120 days to publish the Estimates Notes, so our work to publish the Transition Binders will be subject to a more condensed timeline (90 calendar days). For this reason, it will be imperative that all parties involved adhere to the project timeline to ensure success.

What to Expect Next:

- On the date that the new cabinet is sworn into office, you will receive a Call for Records from the Open Information team. Each ministry will have **11 business days** to provide the records, including a Harms copy.
  - The disclosure requirement continues to apply in the event that your current minister or ministry does not change. As such, ALL prepared Transition Binders are required to be proactively disclosed.
  - To ensure the quality of published records, we will be requesting original digital copies. Scanned versions should be avoided where possible.

Overall Project Timeline:

As noted above, the project will commence on the date that the new cabinet is sworn in, which is anticipated to be November 18, 2022. The table below defines the high level project deliverables. Please note that this project will extend through the December holiday season. Due to the tight timeline, it will be imperative that planned vacation is identified at the start of the project with appropriate backups (with sufficient authority) identified to IAO as early as possible.

Considerations:

- All consultations will be completed between Dec 15 and end of day Dec 29th. While it is understood that this period extends through the holiday season, **no extensions will be permitted and any pending consultations will be deemed complete on December 30, 2022.**

- It is encouraged that each ministry schedule placeholder meetings with the respective Public Body Heads or delegated authorities now, to ensure sufficient time is available for the required review and sign off processes. As indicated in the below project schedule, each ministry will receive their respective package by end of day, January 9th. **Final Ministry approval must be completed between January 10th and end of day January 23rd, 2023.**

Date Completed	Project Deliverable	Responsibility
18-Nov-22	PROJECT TRIGGER: New Cabinet Sworn In	
18-Nov-22	CFR sent	IAO

5-Dec-22	All records received and harms assessed	ministries
14-Dec-22	All consultations identified and sent out	IAO
29-Dec-22	All consultations completed	ministries
9-Jan-23	Finalize redline and Peer Review	IAO
23-Jan-23	Ministry approvals completed	ministries
7-Feb-23	OOP approval completed	Premier's Office
10-Feb-23	Open Information review and final checks	IAO
13-Feb-23	Prep for Publishing Complete	IMB/IAO
14-Feb-23	Transition Notes posted online to OI	IMB/IAO

Project Contacts:

If at anytime, you have questions or concerns regarding this project, please contact the Project Lead, Kara Beach TL Open Information, or myself. This communication has been distributed to the ministry contact list that was validated in September. If your ministry requires any changes to the project distribution list, please let us know.

Thank you for your effort and continued dedication to ensure we meet our public obligations for proactive disclosure.

Regards,

James Pinske
Manager, Innovation and Open Information
Information Access Operations | Ministry of Citizens' Services

Phone: 778.698.3023
PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

From: Pinske, James CITZ:EX
Sent: September 1, 2022 5:39 PM
To: OOP FOI PREM:EX <OOP.FOI@gov.bc.ca>; AEST FOI Coordinator AEST:EX <AEST.FOICoordinator@gov.bc.ca>; AG PSSG FOI Coordinator AG:EX <AGPSSG.FOICoordinator@gov.bc.ca>; Skogstad, Holly AG:EX <Holly.Skogstad@gov.bc.ca>; Latzel, Teresa AG:EX <Teresa.Latzel@gov.bc.ca>; Lyttle, Shawna AF:EX <Shawna.Lyttle@gov.bc.ca>; Bathea, Kenna MCF:EX <Kenna.Bathea@gov.bc.ca>; Biggs, Jackie CITZ:EX <Jackie.Biggs@gov.bc.ca>; CITZ FOI Requests CITZ:EX <CITZ.FOIRequests@gov.bc.ca>; Kennedy, Karla 1 EDUC:EX <Karla.1.Kennedy@gov.bc.ca>; Crockett, Janine EMLI:EX <Janine.Crockett@gov.bc.ca>; EMLI FOI EMLI:EX <MEM.FOI@gov.bc.ca>; Ronda, Haley ENV:EX <Haley.Ronda@gov.bc.ca>; 'Tomczynski, Martyna ENV:EX' <Martyna.Tomczynski@gov.bc.ca>; ENV Information Management Team ENV:EX <ENV.DMO.IRM@gov.bc.ca>; FOI Coordinator FIN:EX <FOI.Coordinator@gov.bc.ca>; Morgan, Melissa FIN:EX <Melissa.Morgan@gov.bc.ca>; Callow, Debbie FIN:EX <Debbie.Callow@gov.bc.ca>; Faust, Marnie L GCPE:EX <Marnie.Faust@gov.bc.ca>; Liu, Susan GCPE:EX <Susan.Liu@gov.bc.ca>; Korchinski, Jaime PSA:EX

<Jaime.Korchinski@gov.bc.ca>; Wells, Katrina PSA:EX <Katrina.Wells@gov.bc.ca>; FOR FOI FOR:EX <flnr.foi@gov.bc.ca>; Wood, Andrea D FOR:EX <Andrea.Wood@gov.bc.ca>; HLTH FOI Operations HLTH:EX <HLTH.FOIOperations@gov.bc.ca>; Shust, Susan D HLTH:EX <Susan.Shust@gov.bc.ca>; Moulton, Holly HLTH:EX <Holly.Moulton@gov.bc.ca>; Murray, Heather HLTH:EX <Heather.Murray@gov.bc.ca>; IRR FOI IRR:EX <IRRFOI@gov.bc.ca>; Ponchet, Kim IRR:EX <Kim.Ponchet@gov.bc.ca>; FOI Economy Sector MUNI:EX <FOI.Inbox@gov.bc.ca>; Kavadas, Alexandra MUNI:EX <Alexandra.Kavadas@gov.bc.ca>; Padgett, David MUNI:EX <David.Padgett@gov.bc.ca>; Hudson, Vicki MUNI:EX <Vicki.Hudson@gov.bc.ca>; Hourston, Sveah LBR:EX <Sveah.Hourston@gov.bc.ca>; Nelson, Shirley D MUNI:EX <Shirley.Nelson@gov.bc.ca>; LWRS FOI LWRS:EX <lwrs.foi@gov.bc.ca>; Workman, Nicholas LWRS:EX <Nicholas.Workman@gov.bc.ca>; Casanova, Tamara MMHA:EX <Tamara.Casanova@gov.bc.ca>; Milne, Karen SDPR:EX <Karen.Milne@gov.bc.ca>; Plamondon, Lea TRAN:EX <Lea.Plamondon@gov.bc.ca>
Cc: Kane, Meghan M CITZ:EX <Meghan.Kane@gov.bc.ca>; Pinske, James CITZ:EX <James.Pinske@gov.bc.ca>
Subject: Proactive Disclosure of Transition Binders

Good afternoon,

As you are aware, we are anticipating a new Cabinet to be sworn into office early December 2022.

This action will trigger the following Ministerial Directives which state that the Transition Binders must be made available through the Open Information website within 90 calendar days of a new Cabinet being sworn in. For illustration purposes, if we assume the new Cabinet is sworn in for December 3rd, 2022, the binders would be required to be published on the Open Information website no later than March 2, 2023. Similar to the process that is currently nearing completion regarding the Estimates Notes Binders, IAO will be coordinating the publication of all Transition Binders.

- 02-2020: Corporate Transition Binder
- 03-2020: Ministers' Transition Binders

IAO will be communicating more specific details regarding the Transition Binder publication project in October.

In preparation for this project, may I request:

1. While your Ministry prepares the Transition Binders, it is recommended that the binder is prepared in a manner that meets business needs while also considering that it will be subject to proactive disclosure. Keeping this in mind during the preparation can significantly ease your ministry's workload during the harms review.

2. If the contacts for your Ministry (or sector), contained within this distribution, do not reflect the contacts that you would like engaged for the Transition Binder project, please provide me with the required updates. (please do not reply all)

Thank you in advance, I am looking forward to connecting with you further in the fall.

Regards,

James Pinske

Manager, Consolidated Intake and Open Information
Information Access Operations | Ministry of Citizens' Services

Phone: 778.698.3023
PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

IAO - Call For Records

December 5, 2022
10:13 AM

RESPONSIBILITY:
Team Lead, Open Information

2022 - Kara Beach

TIMING:

December 7, 2022
1 Business Day

DESCRIPTION:

- The Call for Records (CFR) is delivered to all Ministry clients on the day the new Cabinet is sworn in.

- In 2022 Ministry's were provided 11 business days to upload the:
    - Clean Copy, and
    - Harms Copy

  to the respective Ministry's folder on SharePoint: Proactive Disclosure - Home (gov.bc.ca)

CONSIDERATIONS / BEST PRACTICES

- Add clarity to CFR to ensure Ministry's understand that Corporate binder will be provided by OOP

RESOURCES:

Templates are found in MS TEAMS Innovation & Open Information >> Transition Binder Project, within the CFR folder.

Blank CFR Template- Transition Binder.msg
Call for Records Form - Transition Binder - BLANK.docx

NOTES:

MIN - Provide Clean and Harms Copy

December 5, 2022
10:47 AM

RESPONSIBILITY:
Ministry Contacts

TIMING:

December 7, 2022 - December 22, 2022
11 Business Days

DESCRIPTION:

- Ministries upload the:
  - Clean Copy, and
  - Harms Copy

to the respective Ministry's folder on SharePoint: Proactive Disclosure - Home (gov.bc.ca)

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

RESOURCES:

SharePoint: Proactive Disclosure - Home (gov.bc.ca)

NOTES:

-

IAO - Consultations Identified

December 5, 2022

10:24 AM

RESPONSIBILITY:
IAO Project Team Analysts

2022 - Transition Binder Project

Team	Primary	Secondary
Resource	Regan Batt	Annelise Kempling
Central	Ryan Schumm/ Toyoko Doyle	Sascha Pannwitz/ Pablo Frederick
Health/Justice	Nicola Lutte / Kelly Morita	Kristen Sanderson/ Arun Sudireddy
Social/Tech	Katie Nieminen	Katie Grieve

TIMING:

December 23, 2022 - January 5, 2023
7 Business Days

DESCRIPTION:

- Project Analysts complete first review of ministry identified harms and coordinate with ministry contact where appropriate when clarity/justification is required.

- Consultations are prepared by Project Analysts based on requests identified by the ministry and loaded into SharePoint: Proactive Disclosure - Home (gov.bc.ca) within the receiving ministry's folder using a new subfolder: "Consultations Directed to [min acronym]"

- Project Analysts notify applicable PB's of requested consultation and include a link to the SharePoint where consultation is stored.

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

RESOURCES:

Email Template for Consultation Requests

NOTES:

MIN - Consultations Completed

December 5, 2022
10:51 AM

RESPONSIBILITY:
Ministry Contacts
Support by: IAO Project Analysts

TIMING:

January 6, 2023 - January 18, 2023
9 Business Days

DESCRIPTION:

- Consulted Ministries upload Harms to the respective Ministry's consult folder on SharePoint: Proactive Disclosure - Home (gov.bc.ca)

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

RESOURCES:

SharePoint: Proactive Disclosure - Home (gov.bc.ca)

NOTES:

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

IAO - Finalize Redline and Peer Review

December 5, 2022
10:38 AM

RESPONSIBILITY:
IAO Project Team Analysts
IAO Assigned Peer Reviewers

2022 - Transition Binder Project

Team	Primary	Secondary
Resource	Regan Batt	Annelise Kempling
Central	Ryan Schumm/ Toyoko Doyle	Sascha Pannwitz/ Pablo Frederick
Health/Justice	Nicola Lutte / Kelly Morita	Kristen Sanderson/ Arun Sudireddy
Social/Tech	Katie Nieminen	Katie Grieve

TIMING:

January 19, 2023 - January 26, 2023
6 Business Days

DESCRIPTION:

- Project Team Analysts incorporate harms identified by consulted PB's
- Project Team Analysts notify Central Team analyst of any potential impact to Corporate Binder
- Peer review completed

- Redline delivered to Ministry for approval by PB Head or delegated approving authority
    - EXCEPTION: Corporate Binder is NOT sent for approval until ALL Ministry Transition Binders has been approved

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

RESOURCES:

NOTES:

MIN - Approvals Completed

December 5, 2022
10:51 AM

RESPONSIBILITY:
Ministry Contacts
Support by: IAO Project Analysts

TIMING:

January 27, 2023 - February 9, 2023
10 Business Days

DESCRIPTION:

- Ministries provide final approval via formal sign off form or email.

- IAO Project Analysts notify PM and/or OI Manager of any Ministries who may be at risk of late approval.

- OI Manager encourages Ministry clients to refrain from major revisions during this phase and works as an escalation and mediation contact.

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

RESOURCES:

SharePoint: Proactive Disclosure - Home (gov.bc.ca)

NOTES:

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Transition Binder ministry file. See: Axis File for Correspondence

Internal Communications

December 8, 2022
9:33 AM

I added this page to record internal communications sent to the entire project team so that we don't have to each store them in our Outlook inboxes. -RS

<<Transition Binder Project - Call for Records.msg>>

2023 Estimate Binder

May 17, 2023
1:36 PM

Manager:	James Pinske
Project Lead:	Kara Beach

Resources/Tools:

SharePoint - Proactive Disclosure

AXIS - PROAC-2023-30000 (Parent file)

Ministerial Directives:

- 01-2020: Estimate Notes

From <https://www2.gov.bc.ca/gov/content/governments/about-the-bc-government/open-government/open-information/freedom-of-information/ministerial-directives-proactive-releases>

Resources

May 24, 2023
12:24 PM

Manager:	James Pinske
Project Lead:	Kara Beach

Resources/Tools:

The Estimates Debate and Committee of Supply (leg.bc.ca)
MS Teams Chanel: Innovation & Open Information > Estimate Binder Project
SharePoint - Proactive Disclosure
Open Info Website - Estimates notes
PROAC-2023-30000Add link to Axis parent file

Ministerial Directive:
[01-2020 Estimates Notes]

Assignments

September 27, 2022
5:00 PM

Manager:	James Pinske
Project Lead:	Kara Beach

Assignments:

Ministry	**Analyst**	**Axis File for Correspondence** Parent: PROAC-2023-30000
Attorney General	Suzanne (James, Anthony)	MAG-2023-30002
Agriculture and Food	Josh, Nicki, Edmond	AGR-2023-30001
Children and Family Development	Rhiannon/Cameron	CFD-2023-30009
Citizens' Services	Michelle	CTZ-2023-30010
Crown Agencies Secretariat	Michelle	CAS-2023-30011
Declaration Act Secretariat	Josh, Nicki, Edmond	DAS-2023-30012
Education and Child Care	Rhiannon/Cameron	ECC-2023-30013
Emergency Management and Climate Readiness	Suzanne (James, Anthony)	EMC-2023-30014
Energy, Mines and Low Carbon Innovation	Anthony (James, Suzanne)	EML-2023-30015
Environment and Climate Change Strategy	James (Anthony, Suzanne)	MOE-2023-30034
Finance	Chris Hodgson	FIN-2023-30016

Forests	James (Anthony, Suzanne)	FOR-2023-30017
Government Communications and Public Engagement	Toyoko	GCP-2023-30018
Health	Josh, Nicki, Edmond	HTH-2023-30019
Housing	Suzanne (James, Anthony)	HSG-2023-30020
Indigenous Relations and Reconciliation	Josh, Nicki, Edmond	IRR-2023-30021
Jobs, Economic Development and Innovation	Rosemary	JED-2023-30022
Labour	Rosemary	LBR-2023-30023
Mental Health and Addictions	Josh, Nicki, Edmond	MHA-2023-30024
Municipal Affairs	Katie	MMA-2023-30025
Office of the Premier	Chris Hodgson	OOP-2023-30027
Post-Secondary Education and Future Skills	Josh, Nicki, Edmond	PSE-2023-30028
Public Service Agency	Michelle	PSA-2023-30029
Public Safety and Solicitor General	Suzanne (James, Anthony)	PSS-2023-30030
Social Development and Poverty Reduction	Josh, Nicki Edmond	MSD-2023-30035
Tourism, Arts, Culture and Sport	Katie	TAC-2023-30031
Transportation and Infrastructure	Toyoko	TRA-2023-30032
Water, Land and Resource Stewardship	Anthony (James, Suzanne)	WLR-2023-30033

ACTION: Analysts to claim/assign Axis files noted above

Project Schedule

May 23, 2023
9:59 AM

Project Schedule:

Date Completed (End of Day)	Task	Bus Days	Compared to Dec 2022 Transition Binders	Responsibility
May 11	Final Supply Bill Passed			
May 12 (am)	Call For Records sent	1	1	IAO
May 26	all records received and harms assessed	10	11	ministries
Jun 6	all consultations identified and sent out	7	7	IAO
Jun 26	all consultations completed	14	9	ministries
Jul 10	Finalize redline (5 day) and Peer Review (4 days)	9	6	IAO
Jul 31	ministry approvals completed	15	10	ministries
Aug 8	Review for consistency	5	4	IAO
Aug 22	OOP approval completed	10	7	Premier's Office
Aug 29	Open Information review and final checks	5	3	IAO
Aug 31	Prep for Publishing Complete	2	1	IMB/IAO

Sep 1	Estimate Notes posted online to OI	1	1	IMB/IAO
Sep 8	LDD			
	TOTAL	79 (30/49) (38%/62%)	60 (23/37) (38%/62%)	

IAO - Call For Records

December 5, 2022
10:13 AM

RESPONSIBILITY:
Team Lead, Open Information

2023 - Kara Beach

TIMING:

May 12, 2023
1 Business Day

DESCRIPTION:

- The Call for Records (CFR) is delivered to all Ministry clients on the day the Final Supply Bill is passed

- Ministry's are provided 15 calendar days to upload the:
  - Clean Copy, and
  - Harms Copy

  to the respective Ministry's folder on SharePoint: [Proactive Disclosure - Home (gov.bc.ca)]

CONSIDERATIONS / BEST PRACTICES

-

RESOURCES:

Templates are found in MS TEAMS Innovation & Open Information >> Estimates Binder Project, within the CFR folder.

Call for Records - 20232024 Estimate Notes DUE May 26 2023.msg

NOTES:

MIN - Provide Clean and Harms Copy

December 5, 2022
10:47 AM

RESPONSIBILITY:
Ministry Contacts

TIMING:

May 12 - May 26, 2023
10 Business Days

DESCRIPTION:

- Ministries upload the:
  - Clean Copy, and
  - Harms Copy

to the respective Ministry's folder on SharePoint: Proactive Disclosure - Home (gov.bc.ca)

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Estimates Binder ministry file.

RESOURCES:

SharePoint: Proactive Disclosure - Home (gov.bc.ca)

NOTES:

-

IAO - Consultations Identified

December 5, 2022
10:24 AM

RESPONSIBILITY:
IAO Project Team Analysts

2023 - Estimates Binder Project

Team	Primary	Secondary

TIMING:

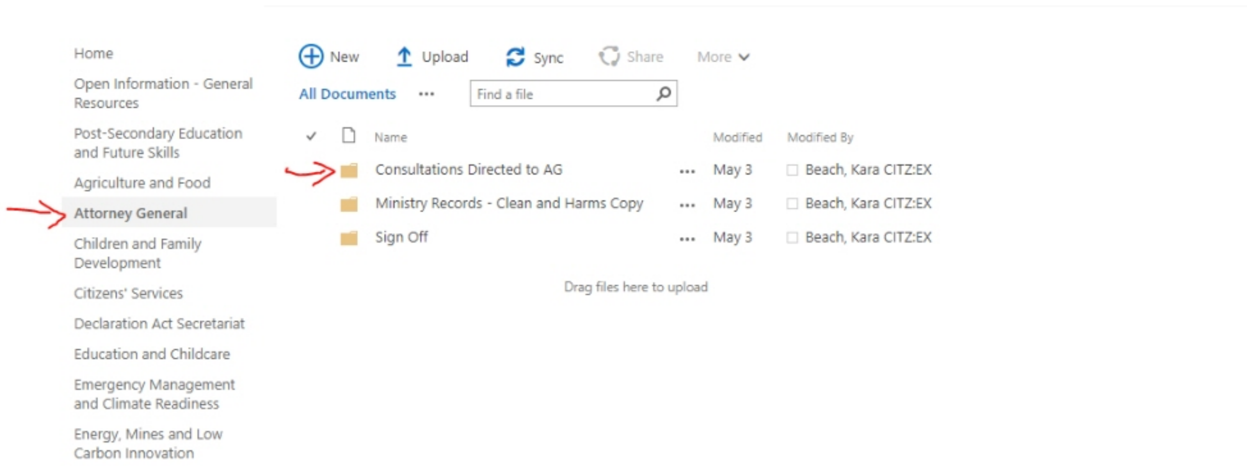
May 29 - June 6 2023
7 Business Days

DESCRIPTION:

- Load records into AXIS Doc Management folder "OI Only – Estimate Binder 2023". Preferred naming convention is "[axis file number] Estimate Notes" i.e "FIN-2023-30123 Estimates Notes"

- Complete first review of ministry identified harms and coordinate with ministry contact, where appropriate. Confirm harms complete and update Excel project tracker.

- Prepare/send required consultations
    - NOTE: All "Issue Notes" authored by GCPE require a consult to GCPE, regardless of if the ministry has requested it or not. Use June 20th due date on all GCPE consults. As GCPE will have a large volume of consults to manage, where possible please try to prioritize getting the GCPE consults out as soon as possible.
    - Identify all consults requested by the ministry or deemed necessary by the Analyst and load relevant pages into SharePoint: Proactive Disclosure - Home (gov.bc.ca) within the receiving ministry's folder.
        - i.e a consult on the FIN binder directed to AG would be found here: Attorney General > Consults Directed to AG > FINANCE



- Notify applicable PB's of requested consultation and include a link to the SharePoint where consultation is stored using the email template:
  Request for Consultation- Estimate Binder Due MMM-DD-YYYY.oft

  - Due Date should be **no later than June 20, 2023**, but can be a shorter timeframe for small consults
  - Update all highlighted fields in the template and make sure the due date is also reflected in the Email **Subject line**

- Project Analyst updates **Consult tab** on: Tracking Sheet - Estimates Binders 2023.xlsx

CONSIDERATIONS / BEST PRACTICES

- External Consults are completed on a best effort basis as they are often not able to be completed within the constraints of the project timeline. If you know that it is impossible for a specific external entity to respond to a consult by the due date, notify the client that the external consult will not be initiated. If proceeding with an external consult, please include verbiage similar to: " If you are not able to respond by this date, we are required to continue processing this file without your recommendations." When communicating with the Ministry client that has requested the external consult, it is important to set realistic expectations and convey to the client that we will coordinate the consult on a best effort basis but that we are unable to delay the timeline if the external entity does not respond within the given timeline.

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Estimates Binder ministry file.

- May be helpful to review the ministry's previous year's Estimates Binder, found in Doc Management, within Cabinet Drawer "OI Only – Estimate Binder 20XX"

RESOURCES:

Request for Consultation- Estimate Binder Due MMM-DD-YYYY.oft
Consult tab on: Tracking Sheet - Estimates Binders 2023.xlsx

NOTES:

MIN - Consultations Completed

December 5, 2022
10:51 AM

RESPONSIBILITY:
Ministry Contacts
Support by: IAO Project Analysts

TIMING:

June 7 - June 26, 2023
14 Business Days

DESCRIPTION:

- Consulted Ministries upload Harms to the respective Ministry's consult folder on SharePoint: Proactive Disclosure - Home (gov.bc.ca)

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Estimates Binder ministry file.

RESOURCES:

SharePoint: Proactive Disclosure - Home (gov.bc.ca)

NOTES:

-

IAO - Finalize Redline and Peer Review

December 5, 2022
10:38 AM

RESPONSIBILITY:
IAO Project Team Analysts
IAO Assigned Peer Reviewers

2023 - Estimates Binder Project

Team	Primary	Secondary

TIMING:

June 27 - July 10, 2023
9 Business Days

DESCRIPTION:

- Project Team Analysts incorporate harms identified by consulted PB's. Must use **OI stamps** when applying harms.

- Project Team Analysts notify Central Team analyst of any potential impact to Corporate Binder

- Peer review completed

- Redline delivered to Ministry for approval by PB Head or delegated approving authority
    - EXCEPTION: Corporate Binder is NOT sent for approval until ALL Ministry Estimates Binders has been approved

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Estimates Binder ministry file.

RESOURCES:

NOTES:

MIN - Approvals Completed

December 5, 2022
10:51 AM

RESPONSIBILITY:
Ministry Contacts
Support by: IAO Project Analysts

TIMING:

July 11 - July 31, 2023
15 Business Days

DESCRIPTION:

- Ministries provide final approval via formal sign off form or email.

- IAO Project Analysts notify PM and/or OI Manager of any Ministries who may be at risk of late approval.

- OI Manager encourages Ministry clients to refrain from major revisions during this phase and works as an escalation and mediation contact.

CONSIDERATIONS / BEST PRACTICES

- Non Transitory correspondence MUST be saved within the correspondence log in AXIS of the appropriate Estimates Binder ministry file.

RESOURCES:

SharePoint: [Proactive Disclosure - Home (gov.bc.ca)]

NOTES:

Questions/Feedback

December 5, 2022
10:00 AM

Through out the project, please record any questions or feedback that you receive from Ministry clients or internal staff that can be shared with other clients and/or considered to improve future communications.

1. Do Ministries need to respond to the CFR with harms for both the Ministry binder and their portion of the OOP Binder? ADD CLARITY TO CFR TEMPLATE
    a. No. Ministry's are only to respond to the CFR with the Ministry Estimates Binder. The OOP Binder is provided by OOP. Harms from the Ministry Binder on content that is also included in the OOP binder will be considered for both. Where this may not be clear, the Ministry will be engaged through the consultation process.

2. Can the Estimates binder be updated? Ministry has new information.
    a. RESPONSE to CLIENT:
    The Estimates Binders represent a snap shot in time, as such, content cannot be amended and must reflect what was in the binder as of the date of the Estimates Debate.

3. Consider adding language to the CFR regarding the requirement to add any required consultation notes to the harms copy.

Project Prep

May 24, 2023
11:52 AM

- James
    - Review lessons learned from last year
    - Solicit Mgrs for assigned analysts - done
    - Create jira ticket with IMB to schedule publication support in applicable sprint - done.
    - CA-578
    - Complete Project Schedule - done -
    - Send Client communication with project schedule - done - sent May 12
    - Schedule kick off team meeting - done
    - Set up OneNote pages - pending
    -

- Kara
    - Set up MS Team's Channel and grant access to project team - pending
    - Set up/confirm structure of SharePoint Proactive Disclosure - Home (gov.bc.ca)
    - Confirm no files remaining from previous project

- Review CFR templates
- Create Axis PROAC parent file with child files for each ministry
    - (Assign to Iris?)
    - See PROAC-2022-20000 as example
        - Iris make sure to use current ministry name list
- Duplicate blank tracker xls from last year - check for ministry names
    - (James to modify consult tabs into 1 tab)
- Email AXIS Support CITZ:EX <AXIS.Support@gov.bc.ca> to have new Axis File Cabinet added (i.e OI Only - 2023 Estimate Notes)