

Gillies, Jessica FIN:EX

Subject: MO Correspondence / FOI
Location: 109 - 617 Government Street - Executive Boardroom

Start: Wed 2017-07-26 10:30 AM
End: Wed 2017-07-26 11:30 AM

Recurrence: (none)

Meeting Status: Accepted

Organizer: Stonnell, Jennifer FIN:EX
Required Attendees: Gillies, Jessica FIN:EX; Gibbs, Chantal FIN:EX; Nicholson, Riley FIN:EX

Categories: Calendar - Meeting

Let me know if this time would work to meet with MO staff

Gillies, Jessica FIN:EX

From: Gillies, Jessica FIN:EX
Sent: Tuesday, July 25, 2017 1:12 PM
To: Stonnell, Jennifer FIN:EX
Subject: RE: Touch base

Yes! I'm free until 2 or after 4. I can come over now if you're available.

Jessica Gillies

Manager, FOI & Correspondence Unit | Ministry of Finance

[FIN FOI SharePoint site](#) | [Correspondence intranet page](#)

phone 250 387-3513

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From: Stonnell, Jennifer FIN:EX
Sent: Tuesday, July 25, 2017 12:41 PM
To: Gillies, Jessica FIN:EX
Subject: Touch base

Hi Jessica – do you have some time this afternoon for a quick meeting just to make sure we are on the same page re: the meeting with Robyn tomorrow as well as talk about e-approvals?

Jennifer Stonnell

A/Director, Executive Operations and Strategic Initiatives | Ministry of Finance

Tel. 250-356-6696 | Email: Jennifer.Stonnell@gov.bc.ca

Gillies, Jessica FIN:EX

From: Gillies, Jessica FIN:EX
Sent: Friday, July 21, 2017 2:14 PM
To: Gibbs, Chantal FIN:EX
Subject: Meeting with MO staff

Lori has asked Jenn to set something up for DMO staff to meet with Robyn about correspondence, FOI, etc. Lori says the MO has no preferences re: process and just wants a process that works for correspondence etc. I said we were hoping that MO would start logging invites again (Lori specifically asked about invites) and she said “then that will be the process.” So all positive.

Jessica Gillies

Manager, FOI & Correspondence Unit

FOI & Correspondence Unit | Deputy Minister's Office | Ministry of Finance

[FIN FOI SharePoint site](#) | [Correspondence intranet page](#)

phone 250 387-3513 | email Jessica.Gillies@gov.bc.ca

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Gillies, Jessica FIN:EX

From: Gillies, Jessica FIN:EX
Sent: Wednesday, July 26, 2017 9:08 AM
To: Hoskins, Chad FIN:EX; Reed, Matt FIN:EX
Subject: RE: MO training?

That's great; thank you both!

Jessica Gillies
Manager, FOI & Correspondence Unit | Ministry of Finance
[FIN FOI SharePoint site](#) | [Correspondence intranet page](#)
phone 250 387-3513

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From: Hoskins, Chad FIN:EX
Sent: Wednesday, July 26, 2017 8:34 AM
To: Reed, Matt FIN:EX; Gillies, Jessica FIN:EX
Subject: RE: MO training?

Hey Jessica, David Curtis and I met with the MA yesterday and extended offers for training as well.

Thanks, Chad

From: Reed, Matt FIN:EX
Sent: Tuesday, July 25, 2017 7:45 PM
To: Gillies, Jessica FIN:EX; Hoskins, Chad FIN:EX
Subject: RE: MO training?

Hi Jessica,

I believe that training has been offered (both FOI training, and the IM training that I normally deliver). I can speak for the IM training – and that we haven't confirmed any sessions yet. Chad (CCed here) can speak for the FOI training offer.

Thanks,
-m

From: Gillies, Jessica FIN:EX
Sent: Tuesday, July 25, 2017 1:38 PM
To: Reed, Matt FIN:EX
Subject: MO training?

Hi Matt,

I am the DMO liaison to the MO for their FOI requests. Do you know if CIRM will be providing any training to new MO staff re: FOI requests, records management, etc.? We're going to meet with the new MA tomorrow and I can give them some info but I was wondering if any formal training is planned.

Thank you!

Jessica Gillies

Manager, FOI & Correspondence Unit

FOI & Correspondence Unit | Deputy Minister's Office | Ministry of Finance

[FIN FOI SharePoint site](#) | [Correspondence intranet page](#)

phone 250 387-3513 | email Jessica.Gillies@gov.bc.ca

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Stonnell, Jennifer FIN:EX

From: Spilker, Robyn PREM:EX
Sent: Tuesday, July 25, 2017 11:07 AM
To: Stonnell, Jennifer FIN:EX
Cc: Nicholson, Riley FIN:EX; Gillies, Jessica FIN:EX; Marquis, Yvette FIN:EX
Subject: RE: Follow-up to your meeting with Lori

Hi Jennifer,

Could we make it 10:30am? 11:00am or 11:30am are open now too.

Thanks,
Robyn

From: Stonnell, Jennifer FIN:EX
Sent: Tuesday, July 25, 2017 9:18 AM
To: Spilker, Robyn PREM:EX
Cc: Nicholson, Riley FIN:EX; Gillies, Jessica FIN:EX; Marquis, Yvette FIN:EX
Subject: RE: Follow-up to your meeting with Lori

Hi Robyn,

Would 10am on Wednesday work?

Thanks,
Jenn

Jennifer Stonnell
A/Director, Executive Operations and Strategic Initiatives | Ministry of Finance
Tel. 250-356-6696 | Email: Jennifer.Stonnell@gov.bc.ca

From: Spilker, Robyn PREM:EX
Sent: Monday, July 24, 2017 4:55 PM
To: Stonnell, Jennifer FIN:EX
Cc: Nicholson, Riley FIN:EX; Gillies, Jessica FIN:EX; Marquis, Yvette FIN:EX
Subject: RE: Follow-up to your meeting with Lori

Hi Jennifer,

Following up on the emails below, is a time on Wednesday morning before 11am when I could stop by? Or Wednesday afternoon between 1:30-3pm?

Thanks,
Robyn

Robyn Spilker
Transitional Ministerial Assistant

to the Honourable Carole James
Minister of Finance and Deputy Premier

From: Spilker, Robyn PREM:EX
Sent: Sunday, July 23, 2017 12:01 PM
To: Stonnell, Jennifer FIN:EX
Cc: Nicholson, Riley FIN:EX; Gillies, Jessica FIN:EX
Subject: Re: Follow-up to your meeting with Lori

Hi Jennifer,

Thanks for following up on these questions. Appreciate your help.

I can come over on Tuesday or Wednesday to discuss further. I'll follow up to arrange a time this Monday.

Robyn

----- Original message -----

From: "Stonnell, Jennifer FIN:EX" <Jennifer.Stonnell@gov.bc.ca>
Date: 2017-07-21 3:36 PM (GMT-08:00)
To: "Spilker, Robyn PREM:EX" <Robyn.Spilker@gov.bc.ca>
Cc: "Nicholson, Riley FIN:EX" <Riley.Nicholson@gov.bc.ca>, "Gillies, Jessica FIN:EX" <Jessica.Gillies@gov.bc.ca>
Subject: Follow-up to your meeting with Lori

Hi Robyn,

Just wanted to follow-up on a few of your questions to Lori from your meeting earlier this afternoon.

FOI – Our Ministry has an FOI Coordinator (we are in the process of filling this position; the position is currently being covered by Marika Anderson) who is responsible for distributing the FOI requests as they come in. They have a generic email box 'FOI Coordinator FIN:EX'. Jessica Gillies, Manager of the FOI and Correspondence Unit is our DMO Liaison to the MO for FOI. For questions related to the FOI process or FOIs themselves you can either contact the FOI Coordinator, Jessica Gillies or myself.

Correspondence – Chantal Gibbs is our Correspondence Coordinator here at the Ministry. She would be your go-to for any correspondence related questions.

That being said, I would be great if we could arrange a time early next week for you to come over to our offices, meet everyone and discuss further.

Would you have time on Tuesday or Wednesday?

Thanks,

Jenn

Jennifer Stonnell

A/Director, Executive Operations and Strategic Initiatives | Ministry of Finance
Tel. 250-356-6696 | Email: Jennifer.Stonnell@gov.bc.ca

Stonnell, Jennifer FIN:EX

From: Curtis, David FIN:EX
Sent: Friday, July 28, 2017 10:56 AM
To: Spilker, Robyn PREM:EX
Cc: Wanamaker, Lori FIN:EX; Stonnell, Jennifer FIN:EX; Kot, Jill MTIC:EX
Subject: RE: FOI process and records management

Hi Robyn,

Thank you for your email and interest in records management and FOI processing. I am available to connect next week and will be in touch to schedule a time that works for you.

We have a number of training resources and specialists who can be of assistance.

Looking forward to connecting.

Regards,

David

From: Spilker, Robyn PREM:EX
Sent: Friday, July 28, 2017 10:33 AM
To: Curtis, David FIN:EX
Cc: Wanamaker, Lori FIN:EX; Stonnell, Jennifer FIN:EX
Subject: FOI process and records management

Hi David,

The DMO let me know you would be a good person to talk to about records management and FOI requests. As the Minister's office gets set up, we're wanting to ensure we have good records management processes in place to make FOI processes as simple as possible. We've had a short training session but could use more information.

Would you have time to meet with me next week for 20-30min?

Thanks,
Robyn

Robyn Spilker
Ministerial Assistant
to the Honourable Carole James
Minister of Finance and Deputy Premier
Province of British Columbia
250-387-3751

**TALB Training Committee
Minutes
July 26, 2017**

Members: Kevin Kilpatrick
Steve Williams
Ivelina Ivanova

Katrina Bystedt
Christian Villeneuve

1. Steve advised that he spoke with Hilary Vance regarding Lynda.com. He learned from Christine Smiley that there are two ways in which one can obtain a subscription to Lynda.com. One is to obtain an organization subscription, which is quite costly, and the other way is to obtain an individual subscription to be shared amongst employees. Christine advised that Strategic HR has approved individual subscriptions for other branches and would willing to approve this for TALB.

Hilary supports a 6-month pilot if an employee is interested in trying it out. Potential complications regarding lack of interest and staff with the access leaving the branch were discussed. Ivelina mentioned that she could look into what kind of courses Lynda.com offers and report back to the committee.

Other options, like TED talks, were also discussed.

2. The group discussed future upcoming courses, such as:
 - a). Contacting Lynette Linkletter regarding future upcoming FOIPPA courses for new employees. Katrina is going to contact Lynette to see if new TALB members can join an upcoming course.
 - b). Christian, Vito, and Steve are working on a course on tips and tricks to process appeals effectively and efficiently. They plan to deliver the presentation sometime in September, although no date has been set.
 - c). Steve mentioned that he will speak with Renny again upon her return for a repeated session of her course on taxpayer contact. Renny has agreed to deliver this again for the Branch, but a date will need to be set.
 - d). Regarding the BC Assessment course, Steve and Christian will touch base and get back to the Committee once they have further information.
 - e). Katrina advised the group that she will begin work on the LEAN Tips & Tricks course soon. Steve mentioned that Oct/Nov may be a great time to have this course.
 - f). There was also discussion of having an Administrative Justice & Assumptions course. It was mentioned that maybe if there was a lawyer interested in the Branch in delivering the course to us, then it should be something we look into. Kevin mentioned Andrew Hutton of CTPB may also be a great resource for this.

Action Items:

Kevin Kilpatrick	<ul style="list-style-type: none">• N/A at this time.
Steve Williams	<ul style="list-style-type: none">• Follow up with management team on Lynda.com• Contact BC Assessment Authority to arrange presentation(s)• Set up taxpayer contact session
Katrina Bystedt	<ul style="list-style-type: none">• Schedule a meeting for next month.• Complete the minutes for July.• Begin work on a LEAN tips & tricks course.• Contact Lynette Linkletter.
Ivelina Ivanova	<ul style="list-style-type: none">• Research Lynda.com and TED Talks for anything of relevance for future courses.
Christian Villeneuve	<ul style="list-style-type: none">• Follow up with BC Assessment & Steve regarding the BC Assessment course.

Spilker, Robyn PREM:EX

From: Stonnell, Jennifer FIN:EX
Sent: Tuesday, July 25, 2017 11:38 AM
To: Spilker, Robyn PREM:EX
Cc: Nicholson, Riley FIN:EX; Gillies, Jessica FIN:EX; Marquis, Yvette FIN:EX
Subject: RE: Follow-up to your meeting with Lori

Hi Robyn,

10:30am it is. Would you like me to send you a meeting invite?

I have booked our boardroom here – we're in Rm 109-617 Government Street. You can use the side entrance to the building on the north side. You will need to give me a call from the lobby when you arrive to gain access to the wing.

Thanks,
Jenn

Jennifer Stonnell
A/Director, Executive Operations and Strategic Initiatives | Ministry of Finance
Tel. 250-356-6696 | Email: Jennifer.Stonnell@gov.bc.ca

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Jenn

Jennifer Stonnell

A/Director, Executive Operations and Strategic Initiatives | Ministry of Finance

Tel. 250-356-6696 | Email: Jennifer.Stonnell@gov.bc.ca

KEY TIPS ON FOI & PRIVACY

July 2017

Important Note: These are selected tips on complying with the *Freedom of Information and Protection of Privacy Act* (FIPPA). They are for general information only and do not cover all issues. Public servants are responsible for FIPPA compliance by ministries and other public bodies. Always consider FIPPA, and consider obtaining expert advice, in the circumstances of each case.

History and Overview of FIPPA

- Access to information is a quasi-constitutional right with *Charter* dimensions. The courts have repeatedly affirmed its importance in keeping governments accountable and informing the public.
- FIPPA allows anyone to request access to government records. Protections exist for policy advice, Cabinet confidences, government's financial interests, legal privilege, law enforcement matters, inter-governmental confidences, individual privacy, and confidential business information. These protect a broad range of public interests.
- FIPPA also regulates the collection, use and disclosure of citizens' personal information. These rules protect individual interests while enabling government to do its work.

Creating records

- FIPPA is silent about what records should be created. It is good public administration to document government decisions and actions. Public servants generally should do this, but if you have a legitimate role in the matter, consider what records you should create to document your role.
- But always think carefully about what you write. Use the "Vaughn Palmer" test: how would you feel if you read your email or other written communication in the media? How would your colleagues or constituents react? Bottom line, *always* assume that every word you write will become public.
- This is especially important with email, which is often conversational and invites off-hand remarks, ambiguous tone or meaning.

- Note that FIPPA does not apply to the constituency records of MLAs. Only records in the “custody or under the control” of a “public body”, including a government ministry, are covered.
- Be careful, therefore, about mingling your constituency records with your ministerial records. Keep them as separate as you can, including in separate filing systems.
- Remember also that if an MLA sends a letter or email to a minister, or to a ministry official or another public body, their copy will almost certainly be covered by FIPPA and therefore possibly disclosed entirely under an FOI request.
- Even though FIPPA doesn’t apply, always assume it might when you write things down. It is also good practice to protect constituents’ privacy as best you can. Treat their personal information as you would wish yours to be treated, including their health information and other sensitive information.

Managing records

- FIPPA is silent on records management and archiving. Follow government policy in deciding what records to keep and what to destroy.
- There is an appropriate place for ‘transitory records’ such as ‘personal working notes’. There is also nothing wrong with face-to-face meetings or phone calls.
- But as a rule of thumb, if it is the public's business then, consistent with the openness goal of FIPPA, you should record information that documents official actions and decisions.
- One clear point is that email or other electronic records are not transitory because they are electronic. The content and context of a record are the key considerations, not its format.
- The government policy on what is a ‘transitory’ record is detailed and lengthy. These questions may help you decide if a record is ‘transitory’, but always defer to existing government policy before you act:
 - Is the function or activity for which the record was produced significant?
 - Is the record significant in relation to the function or activity for which it was produced?

- Does the information in the record, in relation to other records (or records to be created) records, best document the function or activity for which the record was produced?

Destroying records

- Never destroy permanent records. That is the job of public servants.
- You may destroy 'transitory' records, but, if in doubt, get advice from expert public servants before you do so. Remember the 'triple delete' scandal and the political grief it caused.
- Never destroy records, not even 'transitory' records, to which an FOI request applies. Once an FOI request applies to a record, destroying the record is a breach of FIPPA. You have to turn it over for FOI request processing.

Responding to FOI requests

- If public servants ask whether you have records that respond to an FOI request, search diligently for any records. Remember that requests must be interpreted generously. Do not try to play games and read the request down, narrow its scope. Document your search steps, so you can show what you did to search for records.
- Turn over all responsive records for processing. Provide details of your search steps if asked. Do not try to influence public servants in doing their job. Do not stall or delay your response.
- FOI can be challenging. You might be worried that a disclosure will be embarrassing, but always let public servants decide what to release, regardless of how sensitive the matter is. Uninvited involvement in decisions by MLAs, ministers or political staff will make it worse, leading to severe public criticism.
- Unless you are formally asked by public servants, be very cautious about expressing your view about how an FOI request should be answered. Your unsolicited opinion can easily look like an attempt to inappropriately influence the decision, especially where the request has nothing to do with your office.
- Never ask who made the FOI request. Doing so too easily looks like interference.

- Labelling a record 'confidential' or 'protected' will not on its own protect it from disclosure. Confidentiality can be relevant to whether some FIPPA exemptions apply, but it is not a magic shield that protects records.
- Nor do labels like 'advice to minister' or 'privileged and confidential' necessarily protect a record's contents.

Privacy

- Be careful to follow FIPPA's rules on collection, use and disclosure of personal information.
- Being a minister does not mean you are authorized to routinely access the personal information your ministry holds. Personal information about private individuals is operational information and you only should get access on a need-to-know basis in the ordinary course of operations.
- Never disclose personal information without ensuring you are authorized to do so and get advice before doing so.
- This includes in the House. Cabinet ministers in New Brunswick and in Ontario have resigned because they breached someone's privacy in the House.
- This can be frustrating if a private individual has made inaccurate allegations. The desire to set the record straight publicly can be overwhelming. But just because the individual put privacy in play does not mean you can respond by disclosing their personal information.
- *At most* you might consider assuring the House that "the facts are not as this person is claiming", which is itself a risky strategy from a communications perspective.

Spilker, Robyn PREM:EX

From: Spilker, Robyn PREM:EX
Sent: Friday, July 28, 2017 5:58 PM
To: Curtis, David FIN:EX
Subject: RE: FOI process and records management

Hi David,

Here are my phone numbers if you need to reach me next week.

Office: 250-952-7627
s.17

Thanks and have a good weekend,
Robyn

Robyn Spilker
Ministerial Assistant
Minister of Finance and Deputy Premier

From: Curtis, David FIN:EX
Sent: Friday, July 28, 2017 5:30 PM
To: Spilker, Robyn PREM:EX
Subject: FW: FOI process and records management

Hi Robyn,

I don't seem to be able to access your telephone number via the GAL. Is there any chance you may be able to pass it along or give me a call at s.17 when you have a chance?

Thanks again,

David

From: Curtis, David FIN:EX
Sent: Friday, July 28, 2017 10:56 AM
To: Spilker, Robyn PREM:EX
Cc: Wanamaker, Lori FIN:EX; Stonnell, Jennifer FIN:EX; Kot, Jill MTIC:EX
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