From:Executive Update PSA:EX
Sent:16 Dec 2015 14:21:27 -0800
Subject:Executive Update: Freedom of Information and Records Management Improvements



Where ideas work
From the desk of John Dyble

Today the Premier released a statement in response to David Loukidelis' recommendations to government on how to improve Freedom of Information policies and procedures as well as records management practices in response to the Privacy Commissioner's October 22 report.

The Premier reiterated her commitment to ensure government is open and transparent. To that end, all of Mr. Loukidelis' 28 recommendations have been accepted and further actions have been identified to ensure records management and Freedom of Information practices meet public expectations. Mr. Loukidelis' report is available on the Office of the Chief Information Officer website.

Mr. Loukidelis reiterated the importance of good records management practices, noting government sends and receives more than 280 million emails per year. While not all of these records need to be saved, it is important that every public service employee understand their records management responsibilities and manage their emails and other records appropriately.

Mr. Loukidelis noted some confusion across government about which records are transitory and can be deleted and which records must be kept. Effective immediately, the "triple deletion" of emails is prohibited. Further, in the coming months, the definition of transitory records will be revised and training will be held for all public service employees with respect to records management duties and responsibilities.

To lead this work, a new Chief Records Officer is being appointed at the Ministry of Finance. As the Chief Records Officer, Cheryl Wenezenki-Yolland will have responsibility for records management and Freedom of Information administration across government. As government's first Chief Records Officer, Ms. Wenezenki-Yolland will lead the development of clearer guidelines for transitory records as well as work to improve government's practices with respect to assisting Freedom of Information applicants. In the interim, public service employees should continue to use their best professional judgement in the management of records. Information on records management is available:
- Government Records Service Guide: Transitory Records.
- Government Records Service Guide: Email Decision Diagram.

I also want to remind all public service employees to continue to assist applicants who make Freedom of Information requests. This duty starts with good records management practices, extends to conducting thorough and systematic searches for records whenever a request is received, and in the instances when records are not available in your ministry, identifying other areas of government where the records may exist.

More information on transitory records definitions and records management training will be distributed in the New Year. Any questions on records management practices should be directed to your <u>ministry records management officer</u>.

John Dyble
Deputy Minister to the Premier,
Cabinet Secretary and Head of the BC Public Service

Qualizza, Beverly A MTIC:EX

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From:Qualizza, Beverly A MTIC:EX
Sent:14 Dec 2015 09:30:50 -0800
To:Hammerstedt, Amy EAO:EX;Faust, Sophia MTIC:EX;Hendry, Jackie PREM:EX;Chouan, Alexis ENV:EX;Price, Tracy TRAN:EX;Drew, Shelley SDSI:EX;Ray, Jeff TRAN:EX;Thiesson, Alexandra TRAN:EX;MacDonald, Maureen R EDUC:EX;Grant, Erin MTIC:EX
Cc:Cummings, Ann MTIC:EX
Subject:RE: TRIM Information Worker Training on December 17, 2015
Attachments:TRIM Email Filing Guidelines with decision diagram.doc, How to classify a document.doc, Contract Management File Classification, Identification & Process.docx, Resource list for RMTRIM Support.docx, Employee File Classification, Identification & Management.docx, Retention Schedules, Codes and Acronyms.docx, TRIM shortcut keys - wildcards.docx, TRIM list column field contents.doc, TRIM permissions and privileges table.docx, TRIM list and view pane customization for End Users - TRIM 721.docx, TRIM User Label.docx, TRIM list and view pane customization for Information Workers - TRIM 72....docx

Good Morning Everyone!

This is a reminder that you have registered for the **TRIM Information Worker Training** on December 17, 2015.

s.15                                          *Please present yourself to* s.15                    *to receive security pass and directions to* s.15

*If you cannot attend please contact us to let us know as we have a waiting list for the session.*


Session: TRIM Information Worker Training
Time/Day: **8:30 AM – 4:30 PM, December 17, 2015**
Where: s.15
How: Through hands on computer exercises and discussion

- The class exercises are sequential and build upon each other. Success in this course depends on the class completing all of the exercises together. So please arrive on time.
- Prior to the session, please check out the **eleven** reference handouts attached to this email. You can either bring them to your session, or use them as a resource afterwards.
- Exercise hand-outs will be provided in class.
- The temperature of the training room can vary greatly. For your comfort, dressing in layers is recommended.
- Please note that this is a scent-free training room.

Regards,

Bev

**Beverly Qualizza |** Training Analyst **|** Government Record Services **|** Shared Services BC
***Ph:*** 250-952-0451 **|** ***e:*** Beverly.Qualizza@gov.bc.ca **|** ***m:*** PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1
You can register for courses here and find more resources on our homepage

*See the new GRS Information Management community* site *for all of government!*

# EDRMS E-mail Filing Guidelines

Electronic mail (e-mail) consists of a mail header, a message, related contextual information (metadata), and frequently attachments.

All government e-mail is subject to:
- *ARCS* and *ORCS* classification and disposition requirements
- Confidentiality and information security requirements
- *Freedom of Information and Protection of Privacy Act* (*FOIPPA*) information requests
- Privacy and intellectual property laws
- Subpoena or discovery

## Transitory e-mail
The majority of e-mail messages are transitory (i.e., have temporary usefulness) and should be retained for as short a time as possible.

### Examples of transitory e-mail:
- Advertising material (solicited or unsolicited brochures, catalogues, company profiles, conference material, price lists, sales lists, training courses)
- Announcements of social events
- Cc and bcc copies, provided you are not the main staff member in your office (business unit) that is responsible for the matter or project
- Copies or extracts of documents distributed for reference convenience (FYIs)
- E-mails distributing an attachment, provided it does not add value to the attachment (e.g., includes comments or approval information)
- Drafts and revisions, once the final or master document has been produced and provided they do not contain significant content changes from the master document and were not circulated for comment or approval
- Duplicates that are either reproduced or summarized in another document
- Meeting arrangements
- Personal messages and announcements
- Rough notes, calculations, and reference material incorporated in another record
- Simple messages that are the equivalent of a telephone message slip (contact information, shared calendars)

## Official e-mail
Official e-mail is required for ongoing legal, fiscal, audit, administrative, or operational purposes. It is created or received in the transaction of government business or to provide evidence of official policies, actions, transactions, or decisions. It must be filed in the Total Records and Information Management (TRIM) repository of the Enterprise Document and Records Management System (EDRMS) in the appropriate electronic folder promptly after it is sent or received – unless the e-mail is likely to include a series of exchanges (please see *E-mails containing a series of replies* below).

**Examples of official e-mail:**

- Accounts for or describes activities of a business unit, including work schedules and assignments
- Adds value that will benefit others in the business unit or the ministry as a whole (e.g., required for understanding the history of a customer/client relationship, decision, or project)
- Circulates a draft or revision for comment or approval
- Circulates a final report and recommendations
- Communicates formally about official business
- Communicates policies and directives
- Contains decisions, instructions, or advice
- Contains meeting agenda and/or minutes
- Discusses a case or policy issue
- Initiates, authorizes, or completes business transactions
- Provides evidence of an action (e.g., verification or approval allowing you to proceed with a particular course of action)

# Who is responsible for filing official e-mail in TRIM, and when?

### Initiator

- The initiator of an official e-mail (sent either internally or externally) must file it in TRIM. File it promptly after it has been sent -- unless the e-mail is likely to include a series of exchanges (please see *E-mails containing a series of replies* below).

### Recipient

- If you are a recipient of an internal message (i.e., received from another staff member within your business unit) do not capture it in TRIM. In this case, it is the responsibility of the e-mail initiator to file it in TRIM. Your copy is considered a transitory record.

- If you are the main or only business unit recipient of an official external message (i.e., received from outside the ministry) you must file it in TRIM. File it promptly after it has been received -- unless the e-mail is likely to include a series of exchanges (please see *E-mails containing a series of replies* below).

- If there are several business unit recipients of an official external message, the recipient who is mainly responsible for the matter or project must file it promptly in TRIM.

- If you are a cc or bcc recipient of an official external message, check whether the main recipient is a ministry or business unit staff member, if not and you are mainly responsible for the matter or project for your business unit, you must file it promptly in TRIM.

## E-mail containing a series of replies

File e-mail after the last message in the series has been sent, thereby capturing all previous exchanges.

Note: When replies start to deviate from the original e-mail subject, separate and capture them in a new e-mail with a different subject title that clearly reflects the content of the new message.
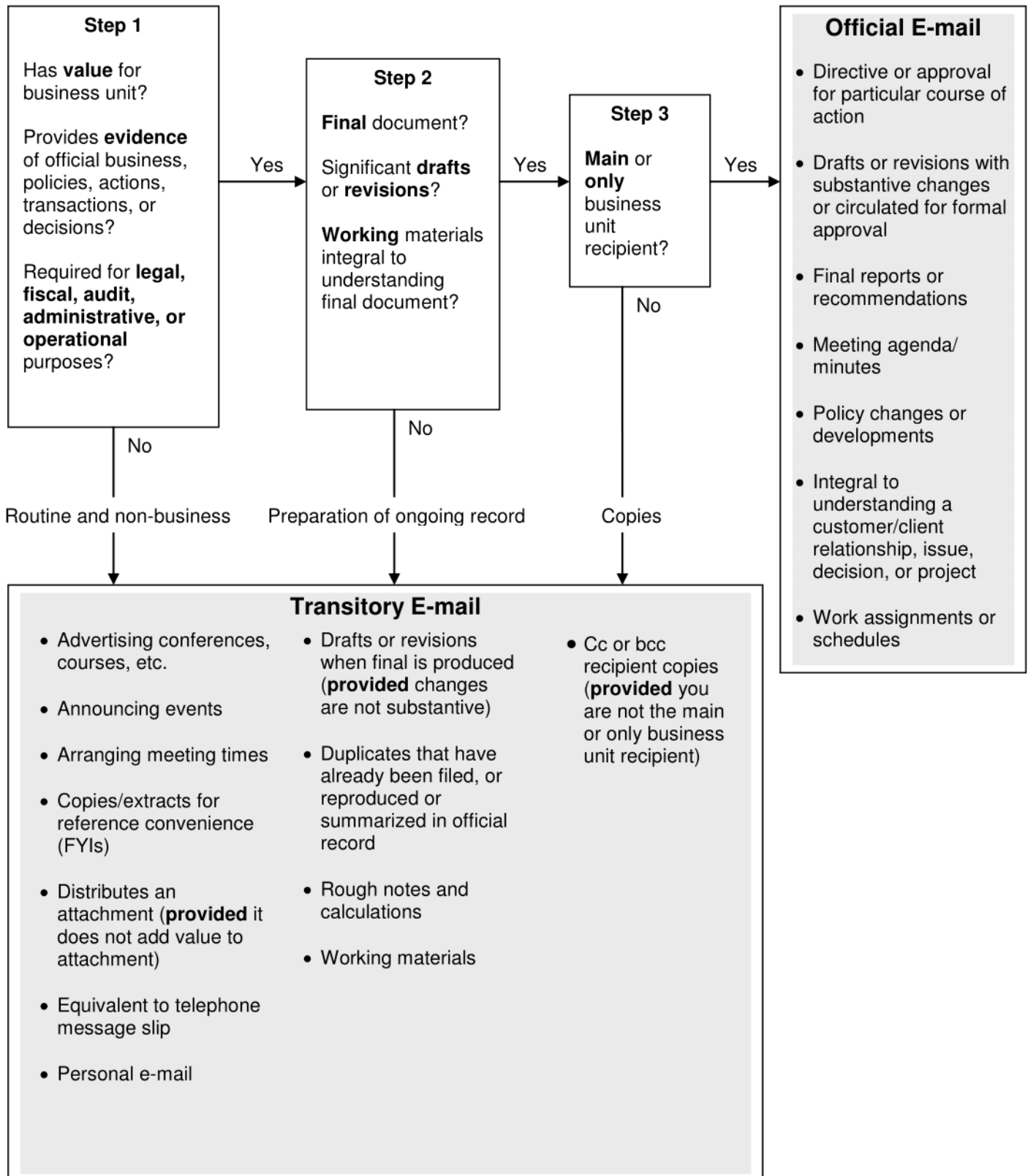
## Tips for more effective e-mail
- Create single topic messages to make filing and retrieval easier
- Use a short, descriptive subject line
- Keep the message as concise as possible
- Avoid jargon, acronyms, and abbreviations
- Format messages for easy reading (avoid complex formatting and graphics)
- Do not send large attachments.  Point to the document in TRIM
- Use distribution lists sparingly
- Avoid 'reply to all'

## References
- *E-mail Guidelines*, Provincial Archives of New Brunswick, 1998
  http://archives.gnb.ca/Archives/RecMan.aspx?L=EN&Section=2
- *E-Mail Management*, BC Liquor Distribution Branch, 2004
- *Guide to Managing Electronic Mail in the Government of Alberta*, Alberta Government Services, Information Management Branch, March 2004 http://www.im.gov.ab.ca/
- *Lynne Tibbitt's E-mail Management Research Files*, BC Corporate Records Management Branch, 2004
- *Managing Government Email,* BC Corporate Records Management Branch, 2004
  http://www.mser.gov.bc.ca/crmb/eimgmt/email.htm
- *Policy on the Management of E-mail Messages*, Provincial Archives of Newfoundland and Labrador http://www.gov.nf.ca/panl/pdf/email_02.pdf

# E-MAIL DECISION DIAGRAM
## OFFICIAL OR TRANSITORY?

**Step 1**

Has **value** for business unit?

Provides **evidence** of official business, policies, actions, transactions, or decisions?

Required for **legal, fiscal, audit, administrative, or operational** purposes?

— Yes →

**Step 2**

**Final** document?

Significant **drafts** or **revisions**?

**Working** materials integral to understanding final document?

— Yes →

**Step 3**

**Main** or **only** business unit recipient?

— Yes →

## Official E-mail

- Directive or approval for particular course of action

- Drafts or revisions with substantive changes or circulated for formal approval

- Final reports or recommendations

- Meeting agenda/ minutes

- Policy changes or developments

- Integral to understanding a customer/client relationship, issue, decision, or project

- Work assignments or schedules

Step 1 — No → Routine and non-business

Step 2 — No → Preparation of ongoing record

Step 3 — No → Copies

## Transitory E-mail

- Advertising conferences, courses, etc.

- Announcing events

- Arranging meeting times

- Copies/extracts for reference convenience (FYIs)

- Distributes an attachment (**provided** it does not add value to attachment)

- Equivalent to telephone message slip

- Personal e-mail

- Drafts or revisions when final is produced (**provided** changes are not substantive)

- Duplicates that have already been filed, or reproduced or summarized in official record

- Rough notes and calculations

- Working materials

- Cc or bcc recipient copies (**provided** you are not the main or only business unit recipient)

# HOW TO CLASSIFY A DOCUMENT

*Classifying a record involves determining its subject or function (based on the categories defined in ARCS or ORCS) and assigning a primary and secondary file number.*

*Assigning the primary and secondary number also assigns the retention period for the record.*

*It's important that file numbers be assigned correctly and consistently - the integrity of the records system depends on it.*

| | |
|---|---|
| **Step1:**<br>**Read the document!**<br><br>**What is it about?** | Yes it sounds obvious but this is how most misfiling happens: someone has jumped to a conclusion based on letterhead or a "re:" line or the colour of the ink and got it wrong.<br><br> - Read the document all the way through.  –<br><br>Read the "re:" line but not just the "re:" line as frequently the record is about another subject entirely or other subjects are discussed.<br><br>The subject is not always obvious and can be indicated in the last paragraph or sentence.<br><br>Is it referring to an existing file? – is this more of the same or something new? |
| **Step 2:**<br>**ARCS?**<br><br>*or* | Is it an ARCS file?<br>• Administrative<br>• housekeeping – personnel, buildings, purchasing, org charts, equipment maintenance, banking, etc<br>• usually internally directed<br>• same type of file could be found in any gov. office |
| **ORCS?** | Is it an ORCS file?<br>• Operational<br>• related to the mandate of your Ministry<br>• usually externally directed<br>• only your ministry likely to have this kind of file |
| **Step 3:**<br><br>***Get that primary number*** | Choose one or more "keywords" that describe the document's subject:<br><br>Find the key word(s) by searching:<br>• Title word or notes word search in ARCS on-line, your ORCS, or in your records classification system<br>• Perusing your local file list |

| | |
|---|---|
| **Get that secondary number** | • turn to the suggested primary in the ARCS/ ORCS manual<br><br>• read the scope note and cross-reference notes of the primary. Is the material you are classifying described in the scope note? If not, try one of the other suggested primaries or another keyword.<br><br>• if so, look at the secondary numbers to determine the most appropriate classification.<br><br>• Look at the retention schedule indicated for the secondary. If the secondary number does not have a specific schedule, then use the "default" schedule (this is the first schedule noted on the page).<br><br>• Ensure that schedule reflects the length of time that is appropriate for the material to be kept.<br><br>• File the material, or create a new file if necessary. Note: Some secondaries in ARCS/ORCS suggest a coding or file arrangement. |
| **Some hints** | • Is the document about policy? That's –00 whatever the primary.<br><br>• Is the document providing instructions, guidelines, procedures? – That's also probably a –00 secondary.<br><br>• Is this something you'll see again and again, like a report, or a client file? This is probably a "case", the secondary will be –20 or above.<br><br>• If it's general information on a topic, it's probably a "subject" file –02 to –19<br><br>• Most of the ministry's important information will be in a case file. |
| **Think you're done? Cross referencing** | If a document deals with more than one subject and should be placed on two or more files, cross reference the document by writing all the file numbers on the upper right-hand corner of the document, photocopy the required number and place on the appropriate files. If the document has more than one page, photocopy the first page only and place the copies on the appropriate files. Place the complete document on the file to which it is primarily related or onto the file that has the longest retention schedule – remember an FR disposition is longer than an SR or DE disposition. |
| **Still can't find it?** | Because activities and programs are constantly changing, ARCS and ORCS are always under review and amendment to ensure that they accurately reflect the activities of the ministry. If you cannot find an appropriate classification for a record, you may require a new or amended classification number. Contact the Records staff in your office for assistance or contact your Records Officer. |

## Contract Management File Classification, Identification & Process

Procurement and contract management records document the acquisition of goods, services, and construction on contract, as well as procurement complaints managed through the vendor complaint review process.

**Classification**

ARCS primary classification 1070 covers the procurement phases and vendor complaint review process for all procurements, and the contract management of most contracts.

ARCS secondary classification 1070-20 covers contract management files. It does not cover the management of the following contracts, which are covered in the ORCS of the appropriate program area:

- third-party program delivery contracts
- complex, large-scale, long-term service contracts (e.g., Public-Private Partnerships and Alternative Service Delivery [ASD] initiatives)
- construction contracts that may require a longer retention period because of litigation concerns (e.g., bridge construction contracts); and
- contracts with guarantees, warranties, and indemnities that have long-term legal liability issues.

Contact your Records Officer if you are uncertain as to whether your contract management files should be classified under secondary 1070-20.

Contract management files (ARCS 1070-20) are closed upon expiry or termination of the contract and conclusion of all extensions to the contract. The files are retained for seven years based on the six-year limitation period for the commencement of an action under the Limitation Act (RSBC 1996, c. 266, s. 3).

Assignments of copyright and waivers of moral rights agreed to in service contract negotiations are classified under secondary 345-50 to ensure they are retained for 50 years. For ease of reference, copies of these documents may be retained in the contract management file.

Contract management involves expense approval, awarding and negotiating contracts, monitoring performance, resolving disputes, and performing post-contract evaluations.

Contract management records include correspondence, final solicitation documents (e.g., requests for proposal), successful proposals or bids, contract negotiation documents, final contracts, contract amendments, certificates of insurance, change requests and change orders, payment schedules, contract monitoring and contract

relationship documents (e.g., progress and status reports and issue resolution records), invoices, payment requisitions, and post-contract evaluation reports.

Procurement records include planning records, solicitation records, evaluation and award records. For administrative convenience, offices may classify procurement records with the contract management files under secondary 1070-20, but in that event, they will be retained for the retention period governing secondary -20.

**Identification**

Contract management and procurement record types are more likely to be subject to litigation then most other records types. Therefore, good recordkeeping of contract records is highly important.

The coding of contract files is ministry specific and have been developed through the use of various IT and manual systems for contract management. Presently there is no one single government standard for contract identification. Contact your Records Officer or relevant ministry authority if you are uncertain as to your ministry coding for contract management files.

Create unique, concise, meaningful titles that will aid in retrieval. Include document version # and date, if relevant. Follow your branch/ ministry document naming and formatting conventions. A standard of coding of ministry contract management files in TRIM should be consistently applied in the Free Text Titles of both folders and documents. Consistent coding should also be applied whenever the retrieval code fields of TRIM e-folder and p-folders are used. Similarly, consistent coding should be used where CRMS and QRMS are the standard records management system.

Entering a clear title with sufficient information into the Free Text Title field helps to ensure searches in TRIM locate and retrieve all relevant records. Consistent use of standard coding will enable the efficient identification, retrieval, management and auditing of contract management files and documents. Furthermore, good recordkeeping of contract records in this regard will enable ministries to better respond to document production in the event of litigation and FOI requests.

The SO (superseded & obsolete) date of TRIM e-folders and p-folders should reflect the SO definition of retention for contract management files, that is, these files are closed upon expiry or termination of the contract and conclusion of all extensions to the contract.

A complete contract file may be comprised of various media, including electronic and physical folders, folder parts and other supplements. In these cases the free text title

fields, date fields and TRIM alternative container fields should be complete, accurate and consistently coded to standard. This will ensure the complete file is easily identified and retrieved, and closed and ultimately disposed of at the same time. All parts and supplements should be labelled.

**Contract File Process**

It is the responsibility of the contract administrator to create a contract file early in the planning pre-award stage of a contract document's development. The following is a process based guideline on creating and managing contract files.

*Title Free Text:*

For advertised contracts, the project name should be used when first creating the file. Once the contract vendor has been selected, the vendor name MUST BE INSERTED in front of the project name in the Title Free Text field of TRIM. Therefore you will need to ensure you are notified once the vendor is selected.

*Series Record:*

There should be no non-OPR contract files. Please contact the MRO for further direction if you are asked to create a non-OPR contract file.

*Retrieval Code:*

The contract number should be available to you at the time the file is being created. The contract administrator is responsible for obtaining the contract number. The contract number also serves as the file retrieval code. For electronic search and retrieval purposes, entry of the contract number/retrieval code must be done exactly as per the ministry/government standard.

Your contract officer/clerk should be using current and correct contract ministry identifier standards, as established by your Financial Management Services Branch or equivalent.

Please be aware of any previous and obsolete standards to avoid confusion and errors.

*Date Created (Opened):* Date of the first piece of correspondence or other similar date – this is not the effective date of the contract.

*Date Closed:* Date determined by the contract administrator (may be the expiry date of the contract).

**SO Date:** Date determined by the contract administrator once all hold-backs, site inspections, and all other obligations on all parties are deemed complete. For small contracts, the SO date could be the same as the Date Closed.

The final disposition date for the complete contract file will be based on the SO Date.

### Using Parts (TRIM; or volumes for CRMS/QRMS):

Using "parts" to organize contract documentation in a consistent manner is recommended. Contract files can become quite large, such as those that are subject to an advertised award process and that have large RFP package submissions.

Separating the contract phases into file "parts" assists in organizing those documents that are not regularly used, but that are essential for post-audit functions. Items such as the advertisement, RFP packages (including unsuccessful tender packages), and rating documents can be placed into their own "parts", with supplements for the bulky items if necessary. This process will ensure that all components of a contract file are retained for their appropriate period of time.

Many direct award files will not require the use of parts.

### Using Supplements (TRIM/QRMS; or enclosures in CRMS):

A SUP file can be created off of the part to which it relates.

...........................................*see example table on next page*

**Example for a multi-year contract with parts separated by phase and year**

| Part # | Contract phase | Documents contained | Free Text Title | Retrieval code | Content end date | Supplementals |
|---|---|---|---|---|---|---|
| Part 1 | Contract planning and pre-award | - feasibility study<br>- planning document (terms of reference)<br>- contract approval request (or equivalent)<br>- required approvals | IS0824N056 Colwood Creek Pre-award<br><br>*Once tendering process is complete, the vendor name can be added:* | IS0824N056 | | Any large items used in this phase such as maps, plans, etc. |
| Part 2 | Contract award | solicitation document (tender package, request for proposals)<br>- record of offers received<br>- signed contract | IS0824N056 Happy Trees Consulting Colwood Creek Award | IS0824N056 | | Supplementals for the unsuccessful bids Put successful RFP into its own supplemental |
| Part 3 | Contract implementation | Monitoring reports, copies of invoices (if being retained on contract file) payment requisitions<br>**utilize leftside/right side filing for physical files if desired | IS0824N056 Happy Trees Consulting Colwood Creek Year 1 implementation | IS0824N056 | End of year 1 activities | Any large items |
| Part 4 | Contract implementation | Documentation relating to year 2 activities (as above) | IS0824N056 Happy Trees Consulting Colwood Creek Year 2 implementation | IS0824N056 | End of year 2 activities | Any large items |
| Part 5 | Contract implementation | Documentation relating to year 3 activities | IS0824N056 Happy Trees Consulting Colwood Creek Year 3 implementation | IS0824N056 | End of year 3 activities | Any large items |
| Part 6 | Contract evaluation post-implementation | All evaluation and post-completion reports | ISOxxxxxx Happy Trees Colwood Creek | IS0824N056 | End of contract activities | Any large items, packages of photographs |

*If using physical files, determine whether the file will be primarily identified by vendor name or project name. The method most commonly used should be listed first as part of the title free text. For offices using colourbar, the first 40 characters will print out on your end-tab alongside the retrieval code.

**For physical files, some contract administrators prefer to have the deliverables (schedules) on their current part, you may need to establish a local office procedure on whether to move the deliverables forward; eventually they will be on the final implementation Part. This is another example of where left-side/right side filing can be beneficial. If documents are being moved forward, please feel free to make a note of that on the file folder so that file users can easily locate relevant material (e.g. for Schedule A, please see current part).

# Resource List for RM/TRIM Support

| | |
|---|---|
| EDRMS.help@gov.bc.ca | Email address for the EDRMS help/support desk. |
| http://www.gov.bc.ca/citz/iao/records_mgmt/guides/rm_training.html | Managing Government Records online course for an introduction to records management. |
| http://www.bclaws.ca/EPLibraries/bclaws_new/document/ID/freeside/00_96099_01 | Document Disposal Act |
| http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/12_Info_Mgmt_and_Info_Tech.htm | CORE Policy and Procedures manual chapter 12 |
| http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/rim_manual/index.html | RIM Policy Manual |
| http://www2.gov.bc.ca/gov/topic.page?id=191474C489EC421BB160EA26B14CAECA | Freedom of Information & Protection of Privacy Act |
| http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/rim_manual/glossary.html | RIM Glossary of Records Management Terms |
| http://www.gov.bc.ca/citz/iao/arcs/ | ARCS online |
| http://www.gov.bc.ca/citz/iao/records_mgmt/special_schedules/index.html | Special Schedules |
| http://www.gov.bc.ca/citz/iao/arcs/admin/codes.pdf | ARCS codes, list of ARCS Personal information bank (PIB) classifications |
| http://www.gov.bc.ca/citz/iao/records_mgmt/arcs_orcs/ORCS/e_reference_library/index.html | ORCS |
| http://www.gov.bc.ca/citz/iao/arcs/appendix/arcs_filing_guide.html | Developing retrieval codes (acronyms) – ARCS online |
| http://www.gov.bc.ca/citz/iao/records_mgmt/rcs/index.html | Forms for records storage, retrieval activities, destruction. |
| http://www.gov.bc.ca/citz/iao/records_mgmt/guides/TRIM/TRIM_guides.html | TRIM Guides, Training Exercises and Tips, Includes:<br><br>TRIM Electronic Documents and Email Interactive Guide - (Online interactive training course on the components of TRIM: how to search for records, how to file electronic documents and emails)<br><br>TRIM Information worker box training interactive Guide - (Online interactive training course on how to box files for semi-active offsite storage) |
| http://www.gov.bc.ca/citz/iao/records_mgmt/edrms_trim/ | Main website for EDRMS/TRIM information. Contains a number of quick reference sheets & folder naming conventions. This site is geared for specific TRIM implementations such as IAO. |
| http://www.gov.bc.ca/citz/iao/records_mgmt/guides/TRIM/TRIM_tips.html | TRIM tips. |
| http://www.gov.bc.ca/citz/iao/records_mgmt/edrms_trim/resource.html | Resources for TRIM Implementation Projects, TRIM quick reference guides. |
| http://www.gov.bc.ca/citz/iao/records_mgmt/guides/TRIM/guide_email_decision_diagram.pdf | Email decision guide |

**Government Records Service Hotline:  250-387-3387**


**Your Records Officers:**

Providing services to:

Advanced Education
Education
Health
Justice
**Terrence McKenny - RMHELP.HealthEducation@gov.bc.ca**

Office of the Premier
BC Public Service Agency
Government Communications and Public Engagement
Technology, Innovation and Citizens' Services
Children and Family Development
Social Development and Social Innovation
**Richelle Wright - RMHELP.CentralAgencyOPS@gov.bc.ca**

BC Public Service Agency
Community, Sport and Cultural Development
Finance
International Trade
Jobs, Tourism and Skills Training, Labour
Transportation and Infrastructure
**Trevor Youdale - RMHELP.BUSINESS@gov.bc.ca**

Aboriginal Relations and Reconciliation
Agriculture
Energy and Mines
Environment
Forests, Lands and Natural Resource Operations
Natural Gas Development
**Jeff Barber - RMHELP.RESOURCES@gov.bc.ca**

Agencies, Boards, and Commissions (ABCs)
**Mike Lauzon – Mike.Lauzon@gov.bc.ca**


Records Advisory Processing Team
**Dean Sutton** - **RCSHELP@gov.bc.ca**

**Your RM/TRIM/CRMS trainers:**

- Ann Cummings, Team Lead Training, Information Access Operations
  *(250) 952-0463*  Ann.Cummings@gov.bc.ca
- Bev Qualizza, Training Officer
  *(250) 952-0451* Bev.Qualizza@gov.bc.ca
- Training Team email TRNRMFOI@gov.bc.ca


**Records Transfer and Destruction:**

To initiate any records transfer or destruction service such as how to obtain:

- Accession / Application Number
- Ongoing Accession Number
- Destruction Number

Go to the forms webpage via the @WORK site under Forms & Tools | Forms | Records Management Forms.

Click on the ARS653 form link.  An electronic form will open.  Follow the instructions at the top of the form.

Once you've submitted the form electronically, you will receive a service request confirmation notice.  This email is for your information only.  It does not have any functionality, nor do you need to retain it.

The ARS653 is also saveable as a PDF form if you wish to retain a copy for your reference.

As a result of your electronically submitted ARS653, your records team will complete the next portions of the ARS 653 form and return it to you for your further completion.

Please note that packed boxes should not weigh over 40 pounds


**Retrieving Records from Offsite Storage:**  Retrieval must be done by fax:  Use ARS626 from the Records Management forms webpage.


**Records Storage Companies:**

Securit (previously Archibald's) **NOW ALSO IRON MOUNTAIN**
Tel (604) 444-4044    Fax (604) 444-4074
300 – 1650 Brigantine Drive
Coquitlam, BC  V3K 7B5

Iron Mountain (previously FACS Vancouver)
Tel (604) 419-8389    Fax (604) 451-0670
8088 Glenwood Drive
Burnaby, BC   V3N 5E9


CUBE Global Storage Ltd (previously Data Base File Tech and Victoria File Tech)
Tel (250) 727-9811    Fax (250)479-5716
4220 Commerce Circle
Victoria, BC  V8Z 6N6

Access (previously FACS Victoria)
Tel  (250) 652-5131    Fax (250) 652-1034
Victoria, Lower Mainland and Kelowna area ONLY

Pickup for <u>Returns</u> to storage:

> Victoria, Greater Vancouver and lower mainland -- must be requested by faxing   ARS633
> Remainder of the province – return via BC Mail Plus.

**Records Disposition**:

See:  http://www.pss.gov.bc.ca/csa/csa.html ("S" for shredding) for more information

Onsite (office curb side) shredding of paper records provided by:

> Recall Total Information Management, Inc.
> CSA-000662

> Shred-It International Inc.
> CSA-000661

Offsite destruction of paper records provided by:

> Recall Total Information Management, Inc.
> CSA -000662

Offsite destruction of multimedia (including microfilm and microfiche; audio/video tapes; magnetic/optical disks, tapes and tape cartridges etc.) provided by:

> Asset Inventory Recovery at: http://www.pss.gov.bc.ca

**Offsiting Supplies:**

Supplies from Office Products Center:  http://www.dcv.gov.bc.ca/product/listing/4321_Filing-Supplies

- Standard box labels for off siting records storage boxes—Product #7520121009 (962) $6.89/pack of 50 labels
- Fold top Storage Boxes--Product #7520121002 (3952) 25/bundle   $2.45 each box

- Map Boxes
      4 x 4 x 36      Product #7520121005   (333) $2.25 each box
      4 x 4 x 48      Product #7520121006   (244) $2.50 each box


The following are ordered from Instabox Vancouver Ltd., 620 Audley Blvd, Annacis Island, Delta BC  V3M 5P2
Phone:  (604) 522-4269; Fax:  (604) 523-0511
- Flat map boxes
      52 x 40 x 3      Item# 48809          52 ½ x 41 x 3    Item# 48810

      Map boxes

      4 x 4 x 36      Item# 028009          4 x 4 x 48      Item# 02007A
      8 x 8 x 40      Item# 028008

## Branch Employee File Classification, Identification & Management

This document provides guidance on classifying and managing branch employee files.

### Classification

Branch employee files are classified under ARCS secondary 1385-20 and belong with the employee's supervisor and are owned by the ministry. They are used by supervisors for the day-to-day supervision and development of employees at the worksite, the management of employees on sick leave and their return to work, as well as investigations of alleged employee misconduct. Record types include correspondence, employee performance and development plans (EPDPs), applications, forms, agreements, reports, and photographs.

While the official employee personnel file is held by BCPSA, supervisors/managers may retain certain job-specific records on the branch employee file. They may include confirmation/verification of employment records, copies of job descriptions, agreements to work different hours, time and leave reporting records, approved vacation requests, EPDPs and related training and development information, investigations of alleged misconduct, relocation information, ergonomic assessments and related letters to employees, building access information, exit interviews, and return to work plans for employees on health-related absences. When EPDPs or equivalent plans are used as an appraisal form signed by the employee and supervisor, a copy is sent to BCPSA for filing on the employee's personnel file. Employee training information is recorded on the Corporate Human Resource Information and Payroll System (CHIPS), which is maintained by BCPSA.

### Identification

Unique, concise, meaningful titles, when consistently applied, enable the efficient identification, retrieval and management of files. Branch employee files should be titled using at a minimum both the employee number and surname of the employee, for example:

"123654 Jones" or "Jones 123654" or "123654 Jones M"
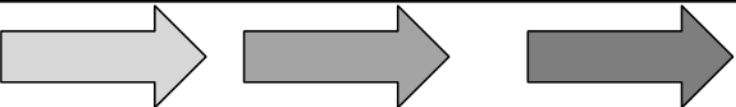
Branch employee files are Personal Information Bank (PIB) records and must be stored in a secured location, such as a locked file cabinet, to prevent inappropriate access. For electronic files, such as TRIM e-folders, access controls should be customized to be restricted to the relevant management access group/individuals.

### Management

The retention schedule of branch employee files is SO nil DE. Files are eligible for destruction when no longer required by manager/supervisor or upon expiry of retention periods stipulated in the collective agreement (e.g., disciplinary records). Usually, when an employee moves to another branch the file should be closed and then destroyed under a Records Destruction Application and NOT be transferred to the new supervisor. The new supervisor would create a new Branch employee file for their own supervisory records.

## Retention Codes, Schedules and Acronyms

The life cycle of records is a way of looking at how records are created and used, with the idea that most records become less important as time passes. Records move through phases, from high use to low use. At time of creation records have a higher value for the creator which may diminish over time. For some records, their value increases as time passes. A records management program employs tools, systems, and procedures to manage each phase of the life cycle. A retention schedule manages the movement of records from the active stage, through the semi-active stage to the final disposition stage. Below are examples of classifications and their associated retention schedules. The definitions of these acronyms are on page 2.

| C R E A T I O N | | | |
|---|---|---|---|
| **ARCS Classifications** **2011 Edition** | **ARCS Retention Schedules** | | |
| | **Active** | **Semi-Active** | **Final Disposition** |
| Non-OPR* | SO | nil | DE |
| 102-20 Ministry meetings | CY + 2y | nil | DE |
| 105-00 Policy and procedures | SO | nil | DE |
| 105-02 Ministry organization | SO | nil | FR |
| 195-30 Ministry operational manuals | SO | 2y | SR |
| 200-20 Committee files | SO | 7y | SR |
| 220-20 Conference and event files | CY + 2y | Nil | DE |
| 275-30 business continuity plans | SO + 1y | 5y | DE |
| 350-20 legal files | SO + 1y | nil | SR |
| 432-20 Accession case files | SO | nil | DE |
| 925-20 Accounts payable | FY + 1y | 6y | DE |
| 1250-20 Treasury Board submission files | FY + 1y | 6y | DE |
| 6450-20 IT projects | SO | 2y | DE |
| FY = April 1st to march 31st; CY = January 1st to December 31st; SO = as defined in the ARCS/ORCS classification notes field | | | |

*The active phase of non-OPR files is identified as SO. However, these files are to be managed based on the active retention schedule of the OPR file. For example: if the OPR file has a retention schedule of CY+2y as its active phase, then the non-OPR file would also be retained for CY+2y.

# *Definitions of Records Acronyms*

A quick reference of commonly used acronyms in records management and other related programs.  For a complete glossary of terms please refer to the RIM Glossary of Records Management Terms at

http://www.gov.bc.ca/citz/iao/records_mgmt/policy_standards/rim_manual/glossary.html

## Classification

| | |
|---|---|
| -00 | Policy |
| -01 | General |
| -02 | Subject File |
| -20 | Case File or Part |
| | |
| ARCS | Administrative Records Classification System |
| CY | Calendar Year |
| d | Day |
| DE | Destruction |
| DOR | Directory of Records |
| ELF | Eliminate Legal-size Folders Program |
| IM | Information Management |
| ISO | Information System Overview |
| FD | Final Disposition |
| FR | Full Retention |
| FY | Fiscal Year |
| m | Month |
| NA | Not Applicable |
| Nil | No semi-active period |
| Non-OPR | Not the Office of Primary Responsibility |
| PIA | Privacy Impact Assessment |
| PIB | Personal Information Bank |
| PID | Personal Information Directory |
| PUR | Public Use Record |
| OPR | Office of Primary Responsibility |
| ORCS | Operational Records Classification System |
| SO | Superseded or Obsolete |
| SR | Selective Retention |
| VR | Vital Record |
| Y | Year |
| w | Week |

## Forms

| | |
|---|---|
| ARS 653 | Records Off-site Transfer/Destruction Request |
| ARS 518 | Records Destruction Authorization |
| ARS 617 | Authority to Transfer Records and Apply Approved Schedule |
| ARS 645 | Records Storage Transfer Request |
| ARS 626 | Offsite Storage Records Retrieval (Fax) |
| ARS 633 | Return to Offsite Storage (Fax) |
| ARS 196 | 60-day Notice of Final Disposition Actions |
| ISA | Information Sharing Agreement |
| Hlth 3323 | Tobacco Litigation – Form D Signoff for Destruction of irrelevant documents |
| ISO | Information System Overview |

## Legislation

| | |
|---|---|
| DDA | *Document Disposal Act* (RSBC 1996) |
| FOIPPA | *Freedom of Information and Protection of Privacy Act* (RSBC 1996) |
| RSBC | Revised Statutes of British Columbia |

## Manuals

| | |
|---|---|
| CPPM | Core Policy and Procedures Manual (also known as CORE manual) |
| RIMM | Recorded Information Management Manual |

## Organizations

| | |
|---|---|
| IAO | Information Access Operations |
| BCA | British Columbia Archives |
| RMO | Records Management Operations |
| RCS | Records Centre Services (part of Records Management Operations) |

## People

| | |
|---|---|
| IPC | Information and Privacy Commissioner |
| IPA | Information and Privacy Analyst |
| RA | Records Analyst |
| RO | Records Officer |
| RAP | Records  Advisory Processing Team |
| PA | Provincial Archivist |

# Shortcut Keys

These are some of the short-cut keys that can be used in TRIM to perform various functions.

## Records:

| [Ctrl][F] | Find Records |
|-----------|--------------|
| [Ctrl][U] | Untag all records in a search window |
| [Ctrl][N] | Create a new record |
| [Alt][Enter] | Opens properties of a selected record |
| [Ctrl][M] | Make a TRIM Reference |

## Menus:

| [Alt][F], x | File | Exit |
|-------------|-------------|
| [Alt][E] | Edit | Menu |
| [Alt][S], C | Search | Current Search |

## Help:

| [Shift][F1] | Invokes the Online Help |
|-------------|-------------------------|
| F1 | Invokes context sensitive help from within a dialogue box |

## Drop-Down List Box:

| Down Arrow | Scrolls down through choices |
|------------|------------------------------|
| Up Arrow | Scrolls up through choices |

## Searches:

| | |
|---|---|
| [Ctrl][F] | Find Records |
| [Ctrl][G] | Open the Saved Searches window |
| [Ctrl][F3] | Browse via Classifications |
| [F4] | Add a saved search or tagged classifications to the Favorites Toolbar |
| [Ctrl][I] | Go to favorites |
| [F7] | Refine a search |
| [Alt][Left Arrow] | Go back to the previous search window (works after using F7 to refine a search) |
| [Alt][Right Arrow] | Go forward to the next search window (works after using F7 to refine a search) |
| [F5] | Refresh |

## Work Tray:

| | |
|---|---|
| [F3] | Add records to the Work Tray |

# Wildcards

A wildcard is a symbol that stands for one or more unspecified characters, which is useful when searching text. In TRIM Context, use the asterisk symbol (**\***) or the Question Mark symbol (**?**).

*For example, to search for the variations on the Title word 'Administration' you would type in 'Administrat\*'. The search will then look for variations on the word 'Administrat' (Administration, Administrator, Administrative, Administration's, etc).*

**The fields that will allow a wildcard search include**

- Word Search Methods
  **! Note: The Question mark '?' wildcard is not enabled for Document Content and Mail Message searches.**
- User Defined Text Fields
- Archiving Search Methods (most, see below)
- Location Search Methods
- Action Tracking Search Methods
- Workflow Search Methods
- Security Search Method
  - *Access Control*
- Miscellaneous Search Methods

**The fields that don't allow a wildcard search include**

- Archiving Search Methods:
  - *Holds*
- Security Search Methods
  - *Security Level*
  - *Security Caveat*

- **Wildcard Symbols**

- **\*** - means any number of characters,
- **?** - means a single character for each '?'

*For example, assume you have words 'cat', 'cart' and 'carrot'*

- **c\*t** - return all three
- **c?t** - returns only cat
- **c??t** - return only cart

**! Note: The wildcard characters percentage sign % and underscore \_ can be used for \* and ? respectively**

## List Columns Field Content – what do they all mean?

| Column Caption | Applies to | Contents | When useful ("Search or Sort to…") | Additional note |
|---|---|---|---|---|
| **Accession number** | Boxes | The tracking number assigned to the group of boxes sent off-site. | Find all boxes within a given Accession. | |
| **Addressee** | Documents Only | Who the email was sent to. | find all records sent to that individual | |
| **Assignee** | All Records | Where the record is now; could be an org unit (it's home location) ort an individual | identify all records in the possession of that individual or location | |
| **Author** | Documents | Individual who wrote the document. Distinct from "Creator" which is the individual who put the document into TRIM. | Find all docs written by an individual | Taken from the Properties data set by the originating application – could be a default "BCGOV" or other less than useful setting. |
| **Checked Out on** | Documents | The day and time the document was checked out to an individual. Note this is distinct from a folder being "assigned" to an individual. | Identify when the record was taken out of TRIM by an individual to be worked on. | |
| **Checked Out to** | Documents | The individual who is currently working with the document. | Identify all the docs checked out by that individual. | |
| **Checked Out?** | Documents | Yes or No – is the document available for editing. | Identify which documents are available for checking out. | |
| **Container (Folder/Box)** | Folders, Documents | Record Number of the folder or box which contains the selected record. | | |
| **Container (Folder/Box) Title** | Folders, Documents | Title of the folder or box which contains the selected record. | | |
| **Content End Date** | P folders only | The last date of the material appearing in the file. | Identifying the date range of the documents within the folder | This is an optional field, used when the Date Ended is not useful |
| **Content Start Date** | P folders only | The first date of the material appearing in the file. | Identifying the date range of the documents within the folder | This is an optional field, used when the Date Created is not useful |
| **Creator** | All records | The individual who put the record into TRIM. | Find all the records created by a given individual | Use the saved search "ME TODAY" which will display all the records you created today |

| Column Caption | Applies to | Contents | When useful ("Search or Sort to…") | Additional note |
|---|---|---|---|---|
| **Date Closed** | Folders, Boxes | Date the folder is no longer available for use. | Find all closed records, or in the negative ("Date Closed = BLANK") all open records | Retention Schedules are triggered at least in part by and entry in this field on the Last Part. |
| **Date Created (Opened)** | All records | Date the record is available for use, often coincides with the date registered. | Find records created within a certain date range | May or may not coincide with the date of the material on the file – see Content Start Date.  Email date created will be the date the email was written |
| **Date Due for Archive (FR)** | Folders | The calculated date (based on the retention schedule) the record is eligible to be transferred to the BC Archives. | Identify all records eligible for Archiving | |
| **Date Due for Archive (SR)** | Folders | The calculated date (based on the retention schedule) the record is eligible for selection to be transferred to the BC Archives or destroyed. | Identify all records eligible for Selective Retention by the Archives | |
| **Date Due for Destruction** | Folders | The calculated date (based on the retention schedule) the record is eligible for destruction. | Identify all records eligible for destruction | |
| **Date Due for Semi Active** | Folders | The calculated date (based on the retention schedule) the record is eligible for semi-active disposition. | Identify all records that should be in off site storage | |
| **Date Modified** | Documents | Date the document was changed. | | |
| **Date Registered** | All Records | The date the record was but into TRIM. | | Distinct from date created, especially with documents. |
| **Disposition** | All records | Status of the record: Active, Semi-Active, Destroyed, transferred to Archives | | |
| **Document Details** | Documents | | | |
| **Document Type** | Documents | Word, Email, Excel etc. | | |
| **First Part** | P folders only | Record Number of the first record in this series of folders | | |
| **Full Classification Number** | Folders | | | |

| Column Caption | Applies to | Contents | When useful ("Search or Sort to…") | Additional note |
|---|---|---|---|---|
| Hardcopy Media Type | P folders only | A pre-defined list to describe if the record is a folder, map, video tape etc | | |
| Home Location | All records | Where the record resides, when not assigned to an individual. | | |
| Is a container (Folder/Box) | Folders, Boxes | Yes or No.  Contains records. | | |
| Is First Part | P folders only | Yes or No | | |
| Is in One or More Holds? | All records | Yes or No.  Records subject to litigation or other activities have a Hold assigned to prevent any disposition action occurring on the record. | | |
| Latest Finalized Version | Documents only | Record number of the Final record | | |
| Latest Part | P folders only | The most current of that series of file folders. | | |
| Latest Version | Documents | Record number of the latest version of this document | | |
| Linked (E and P folders)? | Folders | Yes or No.  Does the file have a complementary record | | |
| Next Part | P folders only | Record Number of the next record in this series of folders | | |
| Owner Location | Folders, Boxes | Location from the Location field – should always be an Org Unit: the Org legally responsible for the record.  (I.e. who signs off on the FOI request?) | | |
| Previous Part | P folders only | Record number of the previous part | | |
| Record Classification | Folders | ARCS or ORCS (FOR) classification | | |
| Record Number | All records | Unique identifier for records in TRIM. | | |
| Record Type | All records | Folder, Box, Document etc. | | |
| Retention Schedule | Folders | Disposition schedule assigned to the record. | | |
| Retrieval Code | Folders | Usually and abbreviation of the Title (Free Text Part) | Finding records – a popular search. | As a word search – is subject to an indexing lag, a new record may not be searchable  by this field for half a day |

| Column Caption | Applies to | Contents | When useful ("Search or Sort to...") | Additional note |
|---|---|---|---|---|
| **Revision Number** | Documents | The revision number of the current document (numbered sequentially as changes are saved to TRIM) | | |
| **Series Content** | Folders | Pre-defined list of OPR status | Identifying the OPR status of a record | |
| **Size** | Documents | Kb/Mg of the record | Can indicate an email with an attachment | |
| **SO Date** | Folders | For records with an "SO" retention schedule, the date the record is made superseded or obsolete, based on the definition in the classification notes | | |
| **Title** | All Records | Combination of Title (Structured Part) and Title (Free Text Part) | | Takes up a lot of real estate on the screen – more useful for reports or excel exports than a screen display |
| **Title (Free Text Part)** | All records | The Narrative title assigned to the record. | Finding records – a popular search. | As a word search – is subject to an indexing lag, a new record may not be searchable by this field for half a day |
| **Title (Structured Part)** | Folders | ARCS or ORC Primary and Secondary Title | | |
| **TRIM Barcode** | All Records | Barcode assigned by TRIM | | |

The following table shows the Record Update Permissions for each of the different login types:

## Record Update Permissions

| TRIM Privileges | Login Type | | | | |
|---|---|---|---|---|---|
| | Administrator | Information Manager | Information Worker | End User | Inquiry Only |
| Create Records | Y | Y | Y | Y | N |
| Modify Records | Y | Y | Y | N | N |
| Delete Records | Y | Y | N | N | N |
| Reverse Final Declaration | Y | Y | N | N | N |
| Create New Parts | Y | Y | Y | N | N |
| Modify Record Class | Y | Y | N | N | N |
| Manage Requests | Y | Y | Y | N | N |
| Record Administration | Y | Y | N | N | N |
| Record Administration (Restricted) | Y | N | N | N | N |
| Record Archivist | Y | Y | N | N | N |
| Document Update | Y | Y | Y | Y | N |
| Document Delete/Purge | Y | Y | Y | N | N |
| Append to Existing Notes | Y | Y | Y | Y | N |
| Can Save Record Searches | Y | Y | Y | Y | Y |
| Add Record Relationships | Y | Y | Y | Y | N |
| Remove Record Relationships | Y | Y | Y | Y | N |
| Attach Contacts | Y | Y | Y | Y | N |
| Remove Contacts | Y | Y | Y | Y | N |
| Set Container for Records | Y | Y | Y | Y | N |
| Change Container | Y | Y | Y | Y | N |
| Remove from Container | Y | Y | Y | Y | N |

## TRIM List Pane & View Pane Customization for End Users

The purpose of this guide is to provide End Users with the knowledge to customise the display of folder, document and box information. TRIM has several different record types, including:

- e-folders
- p-folders
- documents

Record types have unique purposes and properties or metadata; therefore it is desirable to customize the information which TRIM will display for each record type.

The search result window is divided into two parts: the *list pane* on the top and the *view pane* on the bottom. Each pane displays different information about the selected record. The list pane displays a list of search results and is comprised of columns of metadata. The view pane displays information about any record selected in the list pane and is comprised of fields of metadata. The list and view pane fields are customizable. The list pane is usually configured to display columns suited to user tasks, whereas the view pane fields are specific to each record type. The view pane must be customized individually for each record type.

Note: the customized views are specific to your user id and the computer you are using.

Note: to customize these panes you must have some search results displayed.

## Customizing the List Pane

There are two ways to open the column preferences screen to customize the list pane.

1. Right mouse click on any column header and select Format List Columns.

2. Click View in the menu bar and click on Format List Columns.

The column preferences screen displays available columns on the left side and displayed columns on the right side. It is helpful to maximize this screen to allow you to work more efficiently. Navigate the available columns by using the horizontal scroll bar.

There are two ways to make selections from the available columns:

1. Click on a selection, then click the ADD button to move it into the Active Columns, or.

2. Double click on your selection and it will move into the Active Columns.

You can do the same to remove a selection. To move the position of a displayed column, highlight a displayed column and click on the UP or DOWN button. The top column will be the first column displayed in the list pane. Once you have selected the active columns, click OK to return to the search result window.

## End User recommended List Pane columns

| Active Columns | Display | Column Width* | Text Alignment |
|---|---|---|---|
| Record Type* | Icon | | |
| Record Number | Both | Best Fit | Left |
| Title (Free Text Part) | Text | Width in pixels (350) | Left |
| Retrieval Code* | Text | Best Fit | Left |
| Retention Schedule | Text | Best Fit | Left |
| Date Created | Text | Best Fit | Left |

*based on ministry requirements & TRIM set-up.

## Columns Sort Order and Widths

If you left click on a column heading, TRIM will automatically sort the list pane in alphanumeric order according to the column selected. The sort can be in descending or ascending order. Each time you click, TRIM will reverse the order. A small triangle will appear in the Column to indicate the sort order. You can change the width of any column by positioning your mouse on the right edge of the column heading and clicking and dragging to change the column width. You can also right click on any column header and select Best Fit All Columns.

## Customizing the View Pane

The view pane enables you to view additional information or metadata about any item highlighted above in the list pane. The view pane is typically customized by record type – we are interested in different information for each of the record types – e-folders, p-folders, boxes and documents.  In each case we highlight a record type in the list pane and then customize the view pane.

1.  To customize the view pane for e-folders, highlight any yellow folder in the list pane
    To customize the view pane for p-folders, highlight any blue folder in the list pane
    To customize the view pane for documents, highlight any document in the list pane

2.  Position the cursor in the View Pane and right mouse click.  Select Customize

3.  TRIM displays a list of Available Fields and a list of Displayed Fields

4.  Fields are added or removed in the same manner as described in customizing the list pane. The following tables list the recommended view pane fields by record type.

## E-folder recommended view pane fields (yellow folder)

| Active Fields | Description |
|---|---|
| Record Number | Unique identifier for records in TRIM |
| Title | Combination of structured and free text title |
| Alternatively contains | Displays the alternative container |
| Notes | Entries on the Notes tab of the folder properties |
| Access controls | The access settings of the folder, either default or customized |
| Assignee | Where the record is now |
| All holds | Any disposition/litigation hold on the folder |
| Related record | A cross reference to one or more other folders and/or documents |

## P-folder recommended view pane fields (blue folder)

| Active Fields | Description |
|---|---|
| Record Number | Unique identifier for records in TRIM |
| Title | Combination of structured and free text title |
| Owner | The org. unit legally responsible for the record |
| Alternatively contains | Displays the alternative container |
| Notes | Entries on the Notes tab of the folder properties |
| Hardcopy media type | Describes if the record if a folder, map, DVD etc. |
| Home | Where the record resides, when not assigned to an individual |
| Access controls | The access settings of the folder, either default or customized |
| Assignee | Where the record is now |
| All holds | A cross reference to one or more other folders and/or documents |

## Document recommended view pane fields (any document, but not a folder)

| Active Fields | Description |
|---|---|
| Record Number | Unique identifier for records in TRIM |
| Title | Free text title |
| Container (Folder/Box) | Classification number & full title of the folder containing the record; displays as 'Folder' |
| Edit status | Shows if the document is checked-in, checked out, or finalized |
| Date Last updated | Shows the date that the document was last updated |
| Revision # | Shows the latest revision number |
| Checked out to | The individual who is currently working with the document |
| Audit events | Shows the activity history of the document |
| Creator | Individual who put the record into TRIM |
| Author | Individual who wrote the document |
| Addressee | Who the email was sent to |
| Notes | Entries on the Notes tab of the folder properties |
| Date registered | The date the record was put into TRIM |

## Customizing the Classification List and View Panes

End Users sometimes need to look-up classification information when verifying that they are filing to a correct classification.  Important details are found in the classification view pane field which can also inform decision making during disposition processing.

To open the classification window, go to the Tools menu and select Record and then Classifications. The classification window is divided into two parts: the *list pane* on the top and the *view pane* on the bottom.

The list pane displays a list of classifications in hierarchical order, starting with schedule at the top level. The view pane displays information about any classification selected in the list pane and is comprised of fields of metadata.

Classifications may be searched either by expanding classification folders in the list pane or using the F7 key and associated search fields.

To customize the list pane follow the same steps as described earlier to customize the list panes for records.

Add the following columns:  Classification Status; and Retention Schedule

To customize the view pane:

1.  Position the cursor in the view pane and right mouse click.  Select Customize.
2.  TRIM displays a list of Available Fields and a list of Active Fields.
3.  Fields are added or removed in the same manner as described in customizing the list pane.

### Recommended classification view pane fields

| Active Fields | Description |
|---|---|
| Number | ARCS/ORCS classification number |
| Classification title | The full classification structured title up to the secondary level |
| Records security | The security status, e.g. 'standard' |
| Retention schedule | For example SO NIL SR, SO 07Y DE, FY+01Y 06Y DE. |
| Notes | Notes concerning the use of the classification |
| OPR name | The area which is specified as OPR |
| PIB? | Personal Information Bank |
| Classification status | Approved or draft |
| Active from | The date from which the classification may be applied to records |
| Active to | The date up to which the classification may be applied to records |
| Development notes | Notes concerning the history of the classification |

# TRIM – User Labels

User Labels allow TRIM users to create their own system of grouping records shortcuts. The great advantage of creating User Labels is a user can customize a directory of records shortcuts that makes sense for their business needs. Each User Label can have multiple sublevels and there is no limit to the number of User Labels that can be created.

## Create User Labels

To navigate to the User Labels, select Trays from the Shortcut Pane (the left side of the interface). You can also navigate to them by selecting Tools | User Labels.

To create a new User Label:
RMC (Right Mouse Click) | New | New Top Level
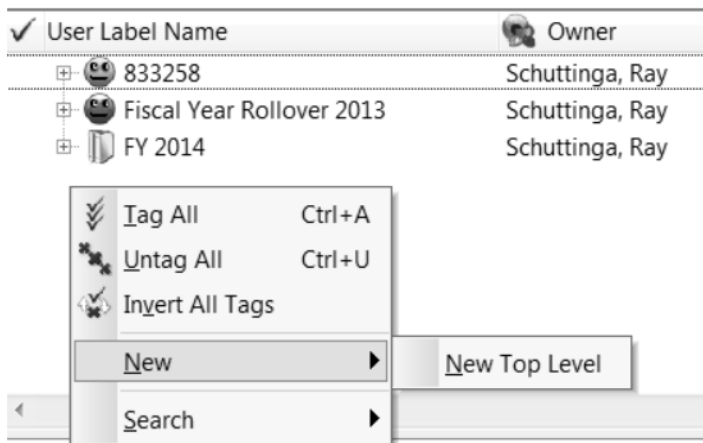
Enter in a name for your User Label (and choose a unique icon if desired). This is now an area in TRIM where you can save your own private shortcuts, a means of navigating to your records

without having to perform a search. To create a sublevel of a User Label, RMC on the existing User Label | New | New Lower Level.

## **Search for the records to send to User Labels**

To send records to a User Label:

Tag the record(s) | RMC | Send To | Add to User Label

Select the appropriate User Label and click OK.

## **View record shortcuts in the User Labels**

Navigate to your user label. To view the shortcuts you have created in your User Label, you can either:

Double click on the User Label, or

RMC on the User Label | Show Records   [CTRL + R]
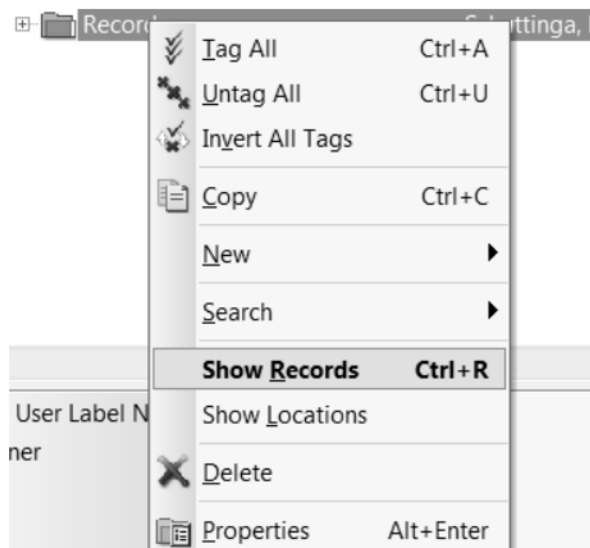


The next screen will show you all of your records that you have sent to your User Label.

You can keep adding as many records as you'd like to the User Label, at any time. If you no longer wanted a shortcut in the User Label, you can tag the record(s) | RMC | select Clear. Remember, you are clearing out the shortcut to the record, not deleting the record itself.

**To modify a User Label**

RMC on the User Label | Properties

You can modify the title and/or the icon.

**To remove a User Label**

When you no longer need a User Label and want to remove it:

RMC on the User Label | Delete

## TRIM List Pane & View Pane Customization for Information Workers

The purpose of this guide is to provide Information Workers with the knowledge to customise the display of folder, document and box information. TRIM has several different record types, including:

- e-folders
- p-folders
- documents
- off-site storage boxes
- destruction boxes

Record types have unique purposes and properties or metadata; therefore it is desirable to customize the information which TRIM will display for each record type.

The search result window is divided into two parts: the *list pane* on the top and the *view pane* on the bottom. Each pane displays different information about the selected record. The list pane displays a list of search results and is comprised of columns of metadata. The view pane displays information about any record selected in the list pane and is comprised of fields of metadata. The list and view pane fields are customizable. The list pane is usually configured to display columns suited to user tasks such as disposition processing, whereas the view pane fields are specific to each record type. The view pane must be customized individually for each record type.

Note: the customized views are specific to your user id and the computer you are using.

Note: to customize these panes you must have some search results displayed.

## Customizing the List Pane

There are two ways to open the column preferences screen to customize the list pane.

1. Right mouse click on any column header and select Format List Columns.

2. Click View in the menu bar and click on Format List Columns.

The column preferences screen displays available columns on the left side and displayed columns on the right side. It is helpful to maximize this screen to allow you to work more efficiently. Navigate the available columns by using the horizontal scroll bar.

There are two ways to make selections from the available columns:

1. Click on a selection, then click the ADD button to move it into the Active Columns, or.

2. Double click on your selection and it will move into the Active Columns.

You can do the same to remove a selection. To move the position of a displayed column, highlight a displayed column and click on the UP or DOWN button.  The top column will be the

first column displayed in the list pane. Once you have selected the active columns, click OK to return to the search result window.

## Information Worker recommended List Pane columns

| Active Columns | Display | Column Width* | Text Alignment |
|---|---|---|---|
| Record Type* | Icon | | |
| Record Number | Both | Best Fit | Left |
| Title (Free Text Part) | Text | Width in pixels (350) | Left |
| Retrieval Code* | Text | Best Fit | Left |
| Retention Schedule | Text | Best Fit | Left |
| Date Created | Text | Best Fit | Left |
| Date Closed | Text | Best Fit | Left |

*based on ministry requirements & TRIM set-up.

## Columns Sort Order and Widths

If you left click on a column heading, TRIM will automatically sort the list pane in alphanumeric order according to the column selected. The sort can be in descending or ascending order. Each time you click, TRIM will reverse the order. A small triangle will appear in the Column to indicate the sort order. You can change the width of any column by positioning your mouse on the right edge of the column heading and clicking and dragging to change the column width. You can also right click on any column header and select Best Fit All Columns.

## Customizing the View Pane

The view pane enables you to view additional information or metadata about any item highlighted above in the list pane. The view pane is typically customized by record type – we are interested in different information for each of the record types – e-folders, p-folders, boxes and documents.  In each case we highlight a record type in the list pane and then customize the view pane.

1.  To customize the view pane for e-folders, highlight any yellow folder in the list pane
    To customize the view pane for p-folders, highlight any blue folder in the list pane
    To customize the view pane for documents, highlight any document in the list pane
    To customize the view pane for storage boxes, highlight any blue box in the list pane
    To customize the view pane for destruction boxes, highlight any red box in the list pane

2.  Position the cursor in the View Pane and right mouse click.  Select Customize

3.  TRIM displays a list of Available Fields and a list of Displayed Fields

4.  Fields are added or removed in the same manner as described in customizing the list pane. The following tables list the recommended view pane fields by record type.

## E-folder recommended view pane fields (yellow folder)

| Active Fields | Description |
| --- | --- |
| Record Number | Unique identifier for records in TRIM |
| Title | Combination of structured and free text title |
| Alternatively contains | Displays the alternative container |
| Notes | Entries on the Notes tab of the folder properties |
| Audit Events | Displays the activity history of the file |
| Access control | The access settings of the folder, either default or customized |
| Creator | Person who created the record in TRIM |
| All holds | Any disposition/litigation hold on the folder |
| Owner | The org. unit legally responsible for the record |
| Related record | A cross reference to one or more other folders and/or documents |

## P-folder recommended view pane fields (blue folder)

| Active Fields | Description |
| --- | --- |
| Record Number | Unique identifier for records in TRIM |
| Title | Combination of structured and free text title |
| Owner | The org. unit legally responsible for the record |
| Alternative Container (Folder/box) | Displays the alternative container |
| Notes | Entries on the Notes tab of the folder properties |
| Audit Events | Displays the activity history of the file |
| Hardcopy media type | Describes if the record if a folder, map, DVD etc. |
| Home | Where the record resides, when not assigned to an individual |
| Access control | The access settings of the folder, either default or customized |
| Assignee | Where the record is now |
| All holds | A cross reference to one or more other folders and/or documents |

## Document recommended view pane fields (any document, but not a folder or box)

| Active Fields | Description |
|---|---|
| Record Number | Unique identifier for records in TRIM |
| Title | Free text title |
| Container (Folder/Box) | Classification number & full title of the folder containing the record; displays as 'Folder' |
| Edit status | Shows if the document is checked-in, checked out, or finalized |
| Date Last updated | Shows the date that the document was last updated |
| Revision # | Shows the latest revision number |
| Checked out to | The individual who is currently working with the document |
| Audit events | Shows the activity history of the document |
| Creator | Individual who put the record into TRIM |
| Author | Individual who wrote the document |
| Addressee | Who the email was sent to |
| Notes | Entries on the Notes tab of the folder properties |
| Date registered | The date the record was put into TRIM |

## Customizing the Classification List and View Panes

Information Workers sometimes need to look-up classification information when creating folders. Important details are found in the classification view pane field which can also inform decision making during disposition processing.

To open the classification window, go to the Tools menu and select Record and then Classifications. The classification window is divided into two parts: the *list pane* on the top and the *view pane* on the bottom.

The list pane displays a list of classifications in hierarchical order, starting with schedule at the top level. The view pane displays information about any classification selected in the list pane and is comprised of fields of metadata.

Classifications may be searched either by expanding classification folders in the list pane or using the F7 key and associated search fields.

To customize the list pane follow the same steps as described earlier to customize the list panes for records.

Add the following columns:  Classification Status; and Retention Schedule

To customize the view pane:

1. Position the cursor in the view pane and right mouse click.  Select Customize.
2. TRIM displays a list of Available Fields and a list of Active Fields.
3. Fields are added or removed in the same manner as described in customizing the list pane.

## Recommended classification list pane columns

| Active Fields | Description |
|---|---|
| Number | ARCS/ORCS classification number |
| Name | 6-digit Legislative schedule number |
| Classification status | Identifies whether the schedule is approved or draft |
| Retention schedule | For example SO NIL SR, SO 07Y DE, FY+01Y 06Y DE. |

## Recommended classification view pane fields

| Active Fields | Description |
|---|---|
| Number | ARCS/ORCS classification number |
| Classification title | The full classification structured title up to the secondary level |
| Record security | The security status, e.g. 'standard' |
| Retention schedule | For example SO NIL SR, SO 07Y DE, FY+01Y 06Y DE. |
| Notes | Notes concerning the use of the classification |
| OPR name | The area which is specified as OPR |
| PIB? | Personal Information Bank |
| Classification status | Approved or draft |
| Active from | The date from which the classification may be applied to records |
| Active to | The date up to which the classification may be applied to records |
| Development notes | Notes concerning the history of the classification |

## Customizing the List Pane and View Pane for Boxing

In order for disposition processing to work smoothly, Information Workers need to view additional list pane columns and view pane fields when applying retention schedules to folders and boxing physical items for transfer to offsite storage or destruction.

The columns and fields in the below tables will be required by Information Workers during disposition processing; however not all columns are usually displayed at the same time, and these columns* are usually undesirable when not carrying on disposition processing work. The TRIM Information Worker Box Training Guide indicates when these fields are needed.

### Required List Pane columns for boxing

| Active Columns | Display | Column Width* | Text Alignment |
|---|---|---|---|
| Record Type | Icon | Best Fit | Left |
| Record Number | Both | Best Fit | Left |
| Title (Free Text Part) | Text | Width in pixels (350) | Left |
| Home* | Both | Best Fit | Left |
| Date created (opened) | Text | Best Fit | Left |
| Date closed* | N/A | Best Fit | Left |
| SO date* | N/A | Best Fit | Left |
| Date due for destruction* | N/A | Best Fit | Left |
| Retention schedule* | Text | Best Fit | Left |
| Date Due for Archive (SR)* | N/A | Best Fit | Left |
| Date Due for Archive (FR)* | N/A | Best Fit | Left |
| Disposition* | Both | Best Fit | Left |

**\*Please Note: Use these columns ONLY when boxing. Using them during other tasks creates an extra workload for TRIM in calculating dates, making it run slower.**

### Recommended view pane fields for boxing

| Active Fields | Description |
|---|---|
| Record Number | Unique identifier for records in TRIM |
| Title | Combination of structured and free text title |
| Owner | The org. unit legally responsible for the record |
| Alternatively contains | Displays the alternative container |
| Notes | Entries on the Notes tab of the folder properties |
| Retrieval code | The acronym or abbreviation associated with the project or activity |
| Hardcopy media type | Describes if the record if a folder, map, DVD etc. |

Quin, Julie A MTIC:EX

---

From:Quin, Julie A MTIC:EX
Sent:18 Dec 2015 13:39:09 -0800
To:Hammerstedt, Amy EAO:EX;Hendry, Jackie PREM:EX;MacDonald, Maureen R
EDUC:EX;Price, Tracy TRAN:EX
Subject:TRIM dataset and Configuration
Attachments:TRIM_config721.pdf, TRIM_initial_dataset_selection721.pdf
Good afternoon

I believe you had TRIM Information Worker training yesterday.

If you need help doing the dataset and configuration please contact me at 250 356 0168

**Julie Quin |** RM Systems Advisor **|** Government Record Service**|** GRS Ministry of Finance
*E:* **Julie.Quin@gov.bc.ca |** *m:* PO Box 9569, Stn Prov Gov, Victoria BC V8W 9V1

**Providing Support for:**
*CRMS, TRIM*
http://www.gov.bc.ca/citz/iao/records_mgmt/
See the new GRS Information Management community site for all of government!
*Please note: 5-digit calling function is no longer available. To contact me, please dial all 10 digits. Thank you.*

**Viewer Tab**

### Starting TRIM Desktop

Double-click on the shortcut icon on your desktop or use the **Start** button,
Start > All Programs > HP TRIM > HP TRIM Desktop

### Configuration Settings

From the main menu select: Tools > Options.

**Ensure your screens match the following illustrations:**
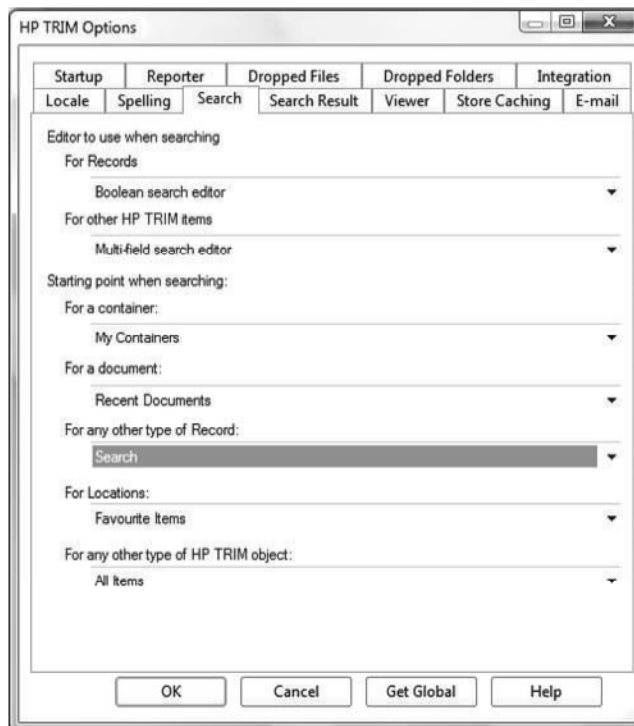
To add any missing file types to the Bypass Viewer list, type the file type extension in here and click Add. Common missed extensions are .doc, .docx, .dwg, .mpp, .ppt, .pptx, .xls, .xlsx and .zip.

<u>Search Tab</u>
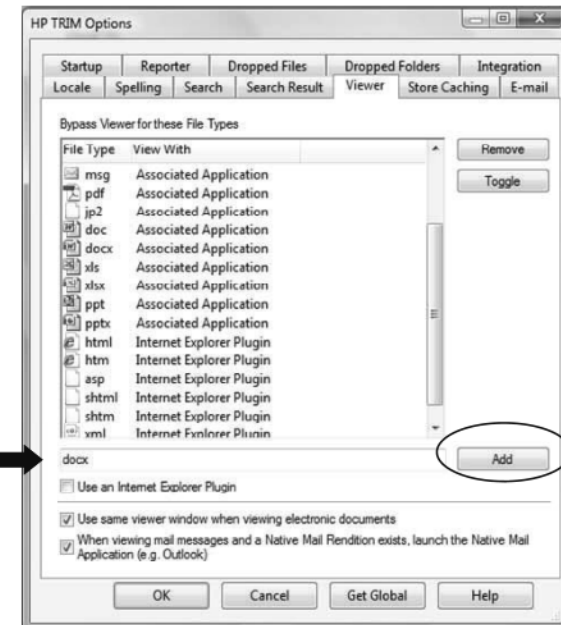
<u>Search Results Tab</u>

## Integration

This is a two step process. First, go to the Integration tab. Select these options, then press OK.

Enter your default document Record Type here.

To complete the integration configuration next go to:
Tools >
HP TRIM Desktop Add-Ins

## Dropped Files Tab

Enter your default document Record Type here.

Change to "Update the E-Mail message with an 'In HP TRIM' indicator"

If you have questions about TRIM, there are many tips and guides available on our website at:

**TRIM Tips:** http://www.gov.bc.ca/citz/iao/records_mgmt/guides/TRIM/TRIM_tips.html

**TRIM Guides and Training materials:** http://www.gov.bc.ca/citz/iao/records_mgmt/guides/TRIM/TRIM_guides.html

**Still having trouble?**
Contact the EDRMS Support Desk:
EDRMS.Help@gov.bc.ca

BRITISH COLUMBIA
The Best Place on Earth
Shared Services BC

ARCS-06450-80/24913A
Version 0.3      Last Edit:  2013-06-27
TRIM version 7.2.1  SP6 build 3519

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# EDRMS TRIM Tip Initial Dataset Selection

**Primary Audience:** All Users

To access TRIM:

1. Go to Start | All Programs | HP TRIM | HP TRIM

2. In the Open HP TRIM Dataset window, click on the **Add** button.
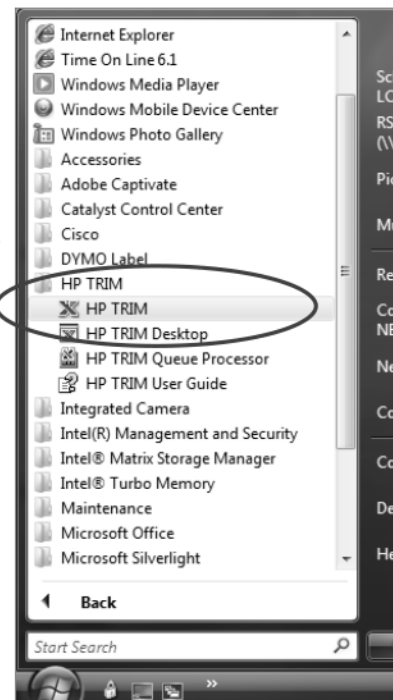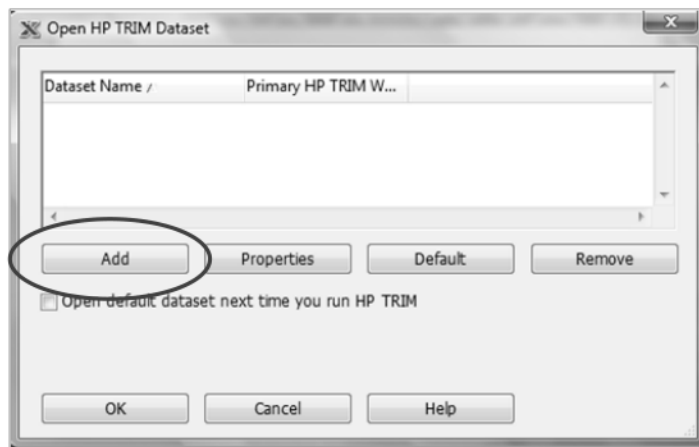
3. In the field under Or TRIM Workgroup Server, type in:
**TRIM-?.EDRMS.GOV.BC.CA** where the **?** is the first letter of your **IDIR ID** (do not use the entire IDIR ID, only the first letter).
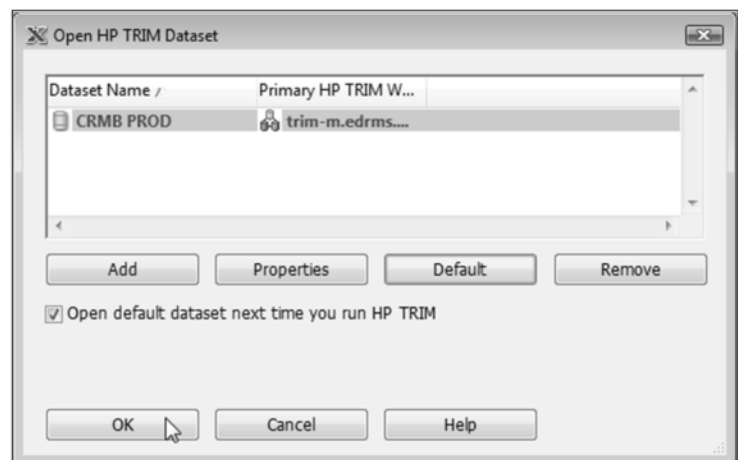
4. Click **Next**.

5. Highlight the dataset you would normally use. Natural Resource Sector (NRS) uses **FOR PROD**, everyone else uses **CRMB PROD**.
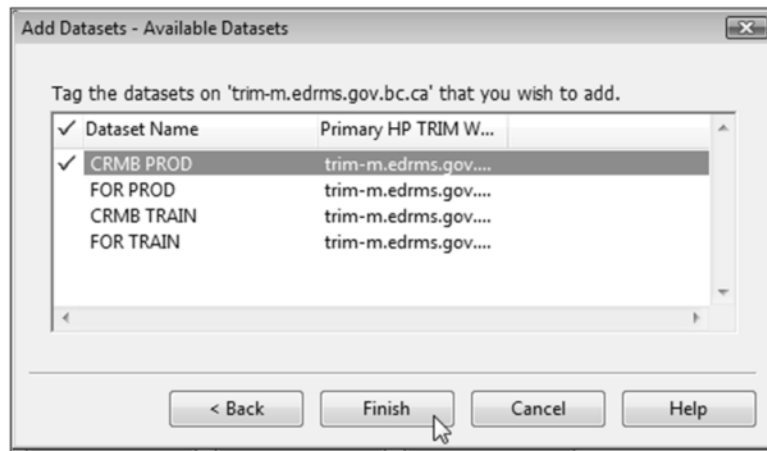


6. Click **Finish**.

7. In the resulting Open HP TRIM Dataset window, highlight the dataset and click on **Default**.



8. Check the box for **Open default dataset next time you run HP TRIM**.

Additional Information and Contacts:

Other TRIM Tips

Records Officers

If you have any questions please do not hesitate to contact EDRMS.Help@gov.bc.ca and we will be happy to assist you.

| | |
|---|---|
| **From:** | Carr, Steve MNGD:EX |
| **Sent:** | Wednesday, December 16, 2015 2:00 PM |
| **To:** | LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants |
| **Subject:** | Memo from Premier Clark |
| **Attachments:** | 2015 12 16 Letter from Premier Clark.pdf |

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

December 16, 2015

Dear Colleagues,

I have always been motivated by a commitment to ensure our government is open and transparent. We have taken many steps to enhance our laws, policies and procedures to meet this commitment.

The Privacy Commissioner's report has identified specific areas in which we can improve, and Mr. Loukidelis has provided additional thoughts and recommendations on how best to implement these improvements. Today, I am announcing that we are accepting all of Mr. Loukidelis' recommendations, and will take further actions to ensure our records management and freedom of information practices meet public expectations.

The practice of 'triple-deleting' will be prohibited, ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed. As soon as practicable, senior public servants will be made responsible for the search of records responsive to information requests on behalf of ministers and political staff. Government also agrees with Mr. Loukidelis's recommendations to study and consider the establishment of duty to document which is currently under review by the Special Committee to Review the Freedom of Information and Protection of Privacy Act.

Finally, the position of Chief Records Officer, along with responsibility for Information Access policy and operations, will reside in the Ministry of Finance to provide corporate over-site and guidance to all ministries and ensure alignment with the agency responsible for human resources across government. This office will also begin work to develop service enhancements aimed at improving our duty to assist freedom of information applicants.

I am confident the actions announced today provide the assurance the public deserves to be confident government is operating in the most open and accountable manner possible.

Sincerely,

Christy Clark
Premier

Province of British Columbia
Office of the Premier
www.gov.bc.ca

PO Box 9041 Stn Prov Govt
Victoria, BC
V8V 9E1

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| | |
|---|---|
| **From:** | Gill, Manjit PSSG:EX |
| **Sent:** | Tuesday, January 5, 2016 5:20 PM |
| **To:** | Carr, Steve PREM:EX |
| **Subject:** | Memo from Premier Clark |

Hi Steve,
I have received this memo from the Premier. I understand it and will abide by it.

Manjit Gill
Chief of Staff to the
Honourable Mike Morris,
Minister of Public Safety and Solicitor General
250-356-2137

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Mann, Carter PREM:EX |
| **Sent:** | Tuesday, December 22, 2015 10:22 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| From: | McPhee, Jordan PREM:EX |
|---|---|
| Sent: | Tuesday, December 22, 2015 8:31 AM |
| To: | Carr, Steve MNGD:EX |
| Subject: | RE: Memo from Premier Clark |

Hi Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Jordan

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Tennant, Laura JAG:EX |
| **Sent:** | Monday, December 21, 2015 10:52 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Reddy, Brandon MTIC:EX |
| **Sent:** | Saturday, December 19, 2015 11:07 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Brandon Reddy

On 16 Dec 2015 1:59 p.m., "Carr, Steve MNGD:EX" <Steve.Carr@gov.bc.ca> wrote:

Good afternoon everyone,


Please see the attached memo from the Premier.


Please confirm that you have received it by replying the following to me in an e-mail:


" I have received this memo from the Premier. I understand it and will abide by it."


Let me know if you have any questions.


Thank you for your attention to this matter,


Steve Carr

| | |
|---|---|
| **From:** | Myers, Tobie A MNGD:EX |
| **Sent:** | Friday, December 18, 2015 11:00 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Memo from Premier Clark |
| **Attachments:** | 2015 12 16 Letter from Premier Clark.pdf |

I have received this memo from the Premier.  I understand it and will abide by it.

Tobie Myers

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

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" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Diacu, Raz TRAN:EX |
| **Sent:** | Friday, December 18, 2015 2:43 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Miniaci, Mario JTST:EX |
| **Sent:** | Thursday, December 17, 2015 4:30 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Dolan, Chelsea PREM:EX |
| **Sent:** | Thursday, December 17, 2015 4:00 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Oliphant, Sam PREM:EX |
| **Sent:** | Thursday, December 17, 2015 12:57 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**Sam Oliphant**
*Press Secretary*
*Office of Premier Christy Clark*
sam.oliphant@gov.bc.ca
250-952-7252

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Cummings, Derek SBRT:EX |
| **Sent:** | Thursday, December 17, 2015 10:38 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Derek

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr
<2015 12 16 Letter from Premier Clark.pdf>

| | |
|---|---|
| **From:** | Chin, Ben PREM:EX |
| **Sent:** | Thursday, December 17, 2015 8:50 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Cc:** | Leamy, Michelle T PREM:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier.  I understand it and will abide by it.

BC

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Robertson, Derek HLTH:EX |
| **Sent:** | Thursday, December 17, 2015 6:37 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.


Derek Robertson
Executive Assistant to the Honourable Terry Lake
Minister of Health
Office: (250) 953-3547

Sent from my BlackBerry

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Bhullar, Barinder PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 9:16 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Hirji, Keivan MNGD:EX |
| **Sent:** | Wednesday, December 16, 2015 5:13 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Denniston, Tristan M ENV:EX |
| **Sent:** | Wednesday, December 16, 2015 3:56 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Good Afternoon,

I have received this memo from the Premier. I understand it and will abide by it.

Regards,
Tristan

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Cadario, Michele PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 3:43 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Cc:** | Leamy, Michelle T  PREM:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received the email and will comply.

Michele

Sent from my BlackBerry 10 smartphone on the TELUS network.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Karod, Suneil JTST:EX |
| **Sent:** | Wednesday, December 16, 2015 3:42 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Blake, Kristen SDSI:EX |
| **Sent:** | Wednesday, December 16, 2015 3:31 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hello Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Congratulations on the new role and I look forward to meeting you soon.

Best Regards,

*Kristen Blake*
*Executive Assistant to the*
*Honourable Michelle Stilwell,*
*Minister of Social Development and Social Innovation*
Office: 250-356-7750
Facsimile: 250-356-7292


**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Dick, Joan L CSCD:EX |
| **Sent:** | Wednesday, December 16, 2015 3:23 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Good afternoon Steve.

"I have received this memo from the Premier. I understand it and will abide by it."

Regards,

Joan

*Joan Dick*
*Chief of Staff to the Honourable Peter Fassbender*
*Ministry of Community, Sport and Cultural Development*
*and Minister responsible for Translink*
*(o) 250-387-2283 (f) 250-387-4312*

---

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Lalari, Terry MCF:EX |
| **Sent:** | Wednesday, December 16, 2015 3:21 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Steve,

I have received this memo from the Premier. I understand it and will abide by it.


Terry

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

> Good afternoon everyone,
>
> Please see the attached memo from the Premier.
>
> Please confirm that you have received it by replying the following to me in an e-mail:
>
> " I have received this memo from the Premier. I understand it and will abide by it."
>
> Let me know if you have any questions.
>
> Thank you for your attention to this matter,
>
> Steve Carr
> <2015 12 16 Letter from Premier Clark.pdf>

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Hodson, Blake JTST:EX |
| **Sent:** | Wednesday, December 16, 2015 3:10 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Hi

I have received this memo from the Premier. I understand it and will abide by it

Blake Hodson

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

>  Good afternoon everyone,
>
>  Please see the attached memo from the Premier.
>
>  Please confirm that you have received it by replying the following to me in an e-mail:
>
>  " I have received this memo from the Premier. I understand it and will abide by it."
>
>  Let me know if you have any questions.
>
>  Thank you for your attention to this matter,
>
>  Steve Carr
>  <2015 12 16 Letter from Premier Clark.pdf>

| | |
|---|---|
| **From:** | Knudsen, Mark ENV:EX |
| **Sent:** | Wednesday, December 16, 2015 3:04 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Thanks,

**Mark Knudsen**
Ministerial Assistant to the Hon. Mary Polak
Minister of Environment
Ph: 250.387.1187 | E: Mark.Knudsen@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

## Phillips, Julia P PREM:EX

| | |
|---|---|
| **From:** | Hintz, Nancy P FLNR:EX |
| **Sent:** | Wednesday, December 16, 2015 3:03 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Nancy Hintz, Executive Assistant to the Honourable Steve Thomson,
Ministry of Forests, Lands and Natural Resource Operations
Phone: 250-387-9275 Fax: 250-387-1040

http://www.gov.bc.ca/for

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Bell, Jordan TRAN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:59 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Good afternoon Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Best,

Jordan

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Bill, Karen F AGRI:EX |
| **Sent:** | Wednesday, December 16, 2015 2:58 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Thank you

Karen Bill
Chief of Staff
Office of the Minister of Agriculture for British Columbia

Phone: (250) 387-1023
Email: Karen.Bill@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Moy, Greg W FIN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:53 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Steve—

I have received this memo from the Premier. I understand it and will abide by it.

- Greg

**Greg Moy**
Executive Assistant
Office of the Minister of Finance and Government House Leader
**250 356-7877**

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Whitelock, Riley CSCD:EX |
| **Sent:** | Wednesday, December 16, 2015 2:51 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hello,

I have received this memo from the Premier. I understand it and will abide by it.

Thank you,

**Riley Whitelock**
Executive Assistant to the Honourable Peter Fassbender
Minister of Community, Sport and Cultural Development
Minister Responsible for TransLink
Tel: (250) 387-2283

---

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Merrifield, Katy HLTH:EX |
| **Sent:** | Wednesday, December 16, 2015 2:49 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**Katy Merrifield**
Chief of Staff to the Honourable Terry Lake
Minister of Health
**Office: (250) 953-3547**
Katy.Merrifield@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Chandler, Penelope E FIN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:42 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |
| **Attachments:** | 2015 12 16 Letter from Premier Clark.pdf |

**Thank you: I have received this memo from the Premier. I understand it and will abide by it.**

*Penelope E. Chandler*
*Chief of Staff (HL)*
*Hon. Michael de Jong, Q.C.*
*Minister of Finance*
*Government House Leader*

*250.387-3751*

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Denney, Jay MIT:EX |
| **Sent:** | Wednesday, December 16, 2015 2:41 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Jay Denney
**Chief of Staff**
Office of *Hon. Teresa Wat*
Minister of International Trade
and Minister Responsible for the
Asia Pacific Strategy and Multiculturalism
T: 250-953-0910

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Sandur, Parveen MCF:EX |
| **Sent:** | Wednesday, December 16, 2015 2:41 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hi Steve,

Please accept this email as confirmation that I have received this memo from the Premier. I understand it and will abide by it.

Regards,
Parveen

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Smukowich, Don AGRI:EX |
| **Sent:** | Wednesday, December 16, 2015 2:32 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

" I have received this memo from the Premier. I understand it and will abide by it."
Sent from my BlackBerry 10 smartphone on the TELUS network.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Holme, Matt TRAN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:32 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Steve,
I have received this memo from the Premier. I understand it and will abide by it.
Thanks,
Matt

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Mason, Jordan A AVED:EX |
| **Sent:** | Wednesday, December 16, 2015 2:29 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Dhanowa, Damon HLTH:EX |
| **Sent:** | Wednesday, December 16, 2015 2:28 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it."

Damon

---

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Petrie, Cynthia MEM:EX |
| **Sent:** | Wednesday, December 16, 2015 2:28 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it

Cynthia Petrie
Chief of Staff to the Hon. Bill Bennett
Minister of Energy and Mines
Office: 250-356-9944 | Cell: 250-882-4289 | E-mail: cynthia.petrie@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Ehl, Cameron FLNR:EX |
| **Sent:** | Wednesday, December 16, 2015 2:26 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Cam

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Facey, Nick MTIC:EX |
| **Sent:** | Wednesday, December 16, 2015 2:25 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Cc:** | Reddy, Brandon MTIC:EX |
| **Subject:** | Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Nick Facey,
Chief of Staff
for the Hon. Amrik Virk
Minister of Technology, Innovation & Citizens' Services

---

From: Steve Carr <Steve.Carr@gov.bc.ca>
Date: Wednesday, December 16, 2015 at 1:59 PM
To: LP Chief of Staff <LPCOS@Victoria1.gov.bc.ca>, LP Ministerial Assistants <LPMAs@Victoria1.gov.bc.ca>, LP
Executive Assistants <LPEAS@Victoria1.gov.bc.ca>
Subject: Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Scheffel, Emile HLTH:EX |
| **Sent:** | Wednesday, December 16, 2015 2:24 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Thanks Steve and congrats on your new role.

E

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Vinning, Gurpreet S EDUC:EX |
| **Sent:** | Wednesday, December 16, 2015 2:20 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

" I have received this memo from the Premier. I understand it and will abide by it."

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | O'Brien, Kellie CSCD:EX |
| **Sent:** | Wednesday, December 16, 2015 2:17 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Good Afternoon Steve,

Thank you for the email. This is to confirm I have received this memo from the Premier. I understand it and will abide by it.

Thanks,
Kellie

**Kellie O'Brien**
Ministerial Assistant to the Hon. Peter Fassbender
Minister of Community, Sport & Cultural Development
and Minister Responsible for TransLink
T: 250-387-2283
E: Kellie.Obrien@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

**Phillips, Julia P PREM:EX**

| | |
|---|---|
| **From:** | Delisle, Corrie EDUC:EX |
| **Sent:** | Wednesday, December 16, 2015 2:16 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

" I have received this memo from the Premier. I understand it and will abide by it."

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Harper, Katie FIN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:15 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Good afternoon,

I have received this memo from the Premier. I understand it and will abide by it.

All the best,

Katie Harper
Executive Assistant to
The Honourable Michael de Jong
Minister of Finance & House Leader
T: 250.387.3751

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

> Good afternoon everyone,
>
> Please see the attached memo from the Premier.
>
> Please confirm that you have received it by replying the following to me in an e-mail:
>
> " I have received this memo from the Premier. I understand it and will abide by it."
>
> Let me know if you have any questions.
>
> Thank you for your attention to this matter,
>
> Steve Carr
>
> <2015 12 16 Letter from Premier Clark.pdf>

| | |
|---|---|
| **From:** | Wallace-Deering, Eric MEM:EX |
| **Sent:** | Wednesday, December 16, 2015 2:09 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hi,

I have received this memo from the Premier. I understand it and will abide by it.

Eric Wallace-Deering

Ministerial Assistant to the Hon. Bill Bennett
Minister of Energy and Mines
250-361-5723

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| From: | Kapac de Frias, Martina E ENV:EX |
|---|---|
| Sent: | Wednesday, December 16, 2015 2:07 PM |
| To: | Carr, Steve MNGD:EX |
| Subject: | FW: Memo from Premier Clark |
| Attachments: | 2015 12 16 Letter from Premier Clark.pdf |

Good afternoon Mr. Carr,

I have received this memo from the Premier. I understand it and will abide by it.

Thank you,

**Martina Kapac de Frias**
Chief of Staff to the Hon. Mary Polak
Minister of Environment
Ph: 250.387.1187 | E: Martina.Kapacdefrias@gov.bc.ca

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**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | De Wit, Antoinette  PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 2:06 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hello Steve and welcome to your new job. I have read the Premier's letter and understand its message.

" I have received this memo from the Premier. I understand it and will abide by it."

Antoinette DeWit
Managing Director
Premier's Correspondence Branch
421 Menzies Street, 2nd Floor

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**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

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" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Togneri, Sebastien MEM:EX |
| **Sent:** | Wednesday, December 16, 2015 2:06 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

Good afternoon,

I have received this memo from the Premier. I understand it and will abide by it.

Bien à vous,

**Sébastien Togneri**
Executive Assistant to the Hon. Bill Bennett
Minister of Energy and Mines and Minister Responsible for Core Review
Office: 250-953-0942 | Cell: 250-893-2147 | E-mail: sebastien.togneri@gov.bc.ca

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

> Good afternoon everyone,
>
> Please see the attached memo from the Premier.
>
> Please confirm that you have received it by replying the following to me in an e-mail:
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> " I have received this memo from the Premier. I understand it and will abide by it."
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> Let me know if you have any questions.
>
> Thank you for your attention to this matter,
>
> Steve Carr
>
> <2015 12 16 Letter from Premier Clark.pdf>

| | |
|---|---|
| **From:** | Sauder, Kit TRAN:EX |
| **Sent:** | Wednesday, December 16, 2015 2:03 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Cc:** | Bell, Jordan TRAN:EX |
| **Subject:** | RE: Memo from Premier Clark |

Good afternoon Steve,

I have received this memo from the Premier. I understand it and will abide by it.

Thank you,

Kit Sauder, Ministerial Assistant
To the Honourable Todd Stone
Minister of Transportation and Infrastructure
C: (250) 889-9133
Kit.Sauder@gov.bc.ca

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Campbell, Carolyn ABR:EX |
| **Sent:** | Wednesday, December 16, 2015 2:03 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

Thanks,
Carolyn

On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:

Good afternoon everyone,

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

<2015 12 16 Letter from Premier Clark.pdf>

| | |
|---|---|
| **From:** | Chalmers, Jennifer AVED:EX |
| **Sent:** | Wednesday, December 16, 2015 2:02 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

> On Dec 16, 2015, at 1:59 PM, Carr, Steve MNGD:EX <Steve.Carr@gov.bc.ca> wrote:
>
> I have received this memo from the Premier. I understand it and will abide by it.

| | |
|---|---|
| **From:** | Strongitharm, Bruce FLNR:EX |
| **Sent:** | Wednesday, December 16, 2015 2:01 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

Message received and read.

---

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Stewart, Josh JAG:EX |
| **Sent:** | Wednesday, December 16, 2015 2:01 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

" I have received this memo from the Premier. I understand it and will abide by it."

Josh

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

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Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

| | |
|---|---|
| **From:** | Cadario, Michele PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 6:50 AM |
| **To:** | Chin, Ben PREM:EX; Carr, Steve MNGD:EX; McPhee, Jordan PREM:EX; Dolan, Chelsea PREM:EX |
| **Subject:** | letter PCC |
| **Attachments:** | letter PCC.doc |

I'd suggest a slight edit to just make clear what policy we are talking about – tracked change is attached.

Michele

1

Page 106

Withheld pursuant to/removed as

s.13

| | |
|---|---|
| **From:** | Cadario, Michele PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 3:43 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Cc:** | Leamy, Michelle T PREM:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received the email and will comply.

Michele

Sent from my BlackBerry 10 smartphone on the TELUS network.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

1

| | |
|---|---|
| **From:** | Cadario, Michele PREM:EX |
| **Sent:** | Tuesday, December 15, 2015 4:28 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | FW: latest versions (Louk) |
| **Attachments:** | Louk_chart_dec 15_draft4.docx; Louk rollout_Dec14_latest draft4.docx; Louk response_PCC statement_Dec14_latest DRAFT4.docx; Louk response_ KMs_ Dec14_latest Draft4.docx; Louk_response_QA_Dec14_latest DRAFT4.docx |
| **Importance:** | High |

*Michele Cadario*
*Deputy Chief of Staff to Premier Christy Clark*

**From:** Gordon, Matt GCPE:EX
**Sent:** Tuesday, December 15, 2015 4:05 PM
**To:** Chin, Ben PREM:EX; Cadario, Michele PREM:EX; Menzies, Brian FIN:EX; Plecas, Bobbi PREM:EX; Henderson, Kim N FIN:EX
**Cc:** Mills, Shane LASS:EX; Woods, Emily GCPE:EX; Gleeson, Kelly T GCPE:EX; Edwardson, Jamie GCPE:EX
**Subject:** latest versions (Louk)
**Importance:** High

- All docs reflect latest versions of last night minus a typo and an added QAs (#4 & #5).... These are on what stays at MTICS and what goes to Finance.

- Chart reflects input from Kim, Bobbi and Ben (time to make more revisions on it if necessary).

- Roll out updated based on latest plan.

Matt Gordon
Assistant Deputy Minister
Corporate Priorities & Communications Operations
Government of British Columbia
250 356.7398 office | 250 896.4923 mobile

1

Page 109 to/à Page 117

Withheld pursuant to/removed as

s.13

| | |
|---|---|
| **From:** | Cadario, Michele PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 9:56 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Fw: Louk FINALS |
| **Attachments:** | Louk_response_QA_Dec16_FINAL.docx; Louk rollout_Dec16_FINAL.docx; Louk_chart_dec 16_FINAL.docx; Louk response_PCC statement_Dec16_FINAL.docx; Louk response_ KMs_ Dec16_FINAL.docx |

FYI

Sent from my BlackBerry 10 smartphone on the TELUS network.

**From:** Gordon, Matt GCPE:EX <Matt.Gordon@gov.bc.ca>
**Sent:** Wednesday, December 16, 2015 9:54 AM
**To:** Mills, Shane LASS:EX; Chin, Ben PREM:EX; Cadario, Michele PREM:EX; Henderson, Kim N FIN:EX; Plecas, Bobbi PREM:EX; Oliphant, Sam PREM:EX; Ives, Andrew PREM:EX
**Cc:** Gleeson, Kelly T GCPE:EX; Menzies, Brian FIN:EX
**Subject:** Louk FINALS

Based on final feedback by boss. Just slight change related to triple deleting and staff and send emails.

Matt Gordon
Assistant Deputy Minister
Corporate Priorities & Communications Operations
Government of British Columbia
250 356.7398 office | 250 896.4923 mobile

1

# David Loukidelis Report – Govt Response
## Questions and Answers
### Dec. 15, 2015

1. **What is your general reaction to the Loukidelis report?**
   - I have always been motivated by a commitment to ensure our government is open and transparent. We have taken many steps to enhance our laws, policies and procedures to meet this commitment.
   - The Privacy Commissioner's report has identified specific areas in which we can improve, and Mr. Loukidelis has provided additional thoughts and recommendations on how best to implement these improvements.
   - We are accepting all of Mr. Loukidelis' recommendations, and will take further actions to ensure our records management and freedom of information practices meet public expectations.

2. **Why are you moving the Chief Records Officer into the Ministry of Finance?**
   - The position of Chief Records Officer and the Information Access Operations office will reside in the Ministry of Finance to provide corporate oversight and guidance to all government ministries and ensure alignment with the agency responsible for human resources across government.
   - This office will also begin work to develop service enhancements aimed at improving our duty to assist freedom of information applicants.

3. **How many people will staff the new Chief Records Officer position in the Ministry of Finance? Can you provide some logistical details about this?**
   - The position of Chief Records Officer, along with responsibility for Information Access policy and operations, will reside in the Ministry of Finance and provide corporate oversight and guidance to all government ministries and ensure alignment with the agency responsible for human resources across government.
   - This office will also begin work to develop service enhancements aimed at improving our duty to assist freedom of information applicants.
   - Further details will be worked through in the coming weeks. There will be costs associated with improvements to service but we have determined this is required and are committed to funding this office appropriately.

4. **What program areas are moving from the Ministry of Technology and Innovation and Citizens' Services to the Ministry of Finance?**
   - A total of four program areas will move from MTICS to the Ministry of Finance as the result of a service realignment:
     - **Information Access Operations** - Fulfils obligations under the FOIPPA, Document Disposal Act (DDA) and the management of records within the provincial government.
     - **Government Records Services and Information Management Act implementation** - Provides answers, online tools, training and assistance with records management

- o **Privacy** - manages policy, standards and training in connection with the Freedom of Information and Protection of Privacy Act (FOIPPA) and the Personal Information Protection Act (PIPA) and manages suspected or known privacy breaches.

5. **What program areas will remain at the Ministry of Technology, Innovation and Citizens' Services?**
   - The following business areas within the Office of the Chief Information Officer will remain with MTICS:
     - o Strategic Initiatives and Partnerships
     - o Information stewardship
     - o Technology Solutions
     - o IT Capital Investment
     - o Procurement Services
     - o Supply Services
     - o Real Property Division
     - o Service BC

6. **Mr. Loukidelis recommends a number of process changes in minister's offices where records management is concerned. How much is it going to cost government to make those changes?**
   - These details will be worked through in the coming weeks. There will be costs associated with improvements to service but we have determined this is required and are committed to implementing his recommendations.

7. s.13

   - The Privacy Commissioner's report has identified specific areas in which we can improve, and Mr. Loukidelis has provided additional thoughts and recommendations on how best to implement these improvements.
   - Today, I am announcing that we are accepting all of Mr. Loukidelis' recommendations, and will take further actions to ensure our records management and freedom of information practices meet public expectations.
   - I am confident the actions announced today provide the assurance the public deserves to be confident government is operating in the most open and accountable manner possible.

8. **Loukidelis recommends that access requests should be handled by career public servants in Minister's offices. How are you going to fulfill this recommendation?**
   - These details will be worked through in the coming weeks.
   - It is Government's intention to create a senior team of experts to fulfill this this recommendation.

9. **How will you be addressing the issue of duty to document?**
   - This will require careful review and consideration. Mr. Loukidelis recommends studying the concept and working out the details in policy at a ministry and program level.

- Government agrees with Mr. Loukidelis's recommendations to study and consider the establishment of duty to document which is currently under review by the Special Committee to Review the Freedom of Information and Protection of Privacy Act.

10. **Triple deletion will be prohibited through policy – but how will you know if people are following the rules? Is it merely based on an honour system that is likely to be abused?**
    - The practice of 'triple-deleting' will be prohibited.
    - Ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed.

11. **What will the penalty be for public servants and political staff who destroy records?**
    - To be clear, it has always been the expectation that public servants conduct themselves in accordance with all rules, guidelines and our code of conduct.
    - Government accepts this recommendation in principle and while there are consequences for not adhering to existing standards, if more should be done to strengthen the rules we will do so.

12. **Loukidelis acknowledges that not every email should be kept as it would be poor records management – is this a vindication of sorts for government?**
    - We agree what is fundamental is ensuring that official records are kept.
    - Policies will be strengthened to ensure it is clear to public servants what records must be retained.

13. **Will government stall implementation of the Information Management Act, given Mr. Loukidelis' expressed concerns about overlapping legislation and confusion for public servants?**
    - This new legislation was drafted with the input of the Office of the Information and Privacy Commissioner and addresses several issues raised by the Commissioner in her review of the Act.
    - That said, Government will take another look at the Information Management Act in light of Mr. Loukidelis' recommendations and determine what if any amendments or policy changes are necessary as a result.

14. **A court ruled that it would be unconstitutional to include the Offence Act in the new IMA so how will you get around this and introduce penalties for wilful destruction of documents or a refusal to produce them?**
    - A 1985 Supreme Court of Canada ruling stated that it is unconstitutional to have a "no-fault offence" with a penalty of imprisonment, which in this context means that it wouldn't be appropriate to have every technical breach of the act be an offence that could result in such severe penalties.
    - Presently, the new Information Management Act excludes coverage by section 5 of the Offence Act, which is common legislative practice.
    - That hasn't precluded government from imposing disciplinary sanctions, contractual penalties and, in extreme cases, criminal proceedings.

15. **Will the changes recommended by Mr. Loukidelis solve a common occurrence whereby there is a discrepancy in responsive records from two sources?**
    - Mr. Loukidelis recommends that clear policy be developed and specific training for public servants be implemented to help address the issues raised by the Information and Privacy Commissioner and Mr. Loukidelis' own recommendations.
    - We accept Mr. Loukidelis' recommendation to update and enhance our transitory records policy, notably in relation to emails.
    - We will also be improving training for public service and political staff to ensure that records that should be kept, are kept and if requested through FOI are included as a responsive record.
    - It is possible that transitory records that have no further business value to the employee who has them may result in different records submitted by different sources.
    - As Mr. Loukidelis suggests as possible guidelines, that you are responsible for the capture of records if the following apply:
        - You are the sender
        - You have received an email from an external sender and you are the only recipient in your agency
        - if you have received an email from an external sender and you are one of many recipients in your agency – the person who is most directly involved in the issue or task.
    - We will need more time to consider and update our transitory records policy.

16. **The OIPC recently ruled in favour of government in prohibiting the release of all message logs in government. It looks like government is arguing the email addresses of employees are private information and therefore will not be included in future FOIs, is that the case?**

    - The Ministry agrees with the ruling of the OIPC, which states that the request would be ineffective in facilitating the access to, and public scrutiny of, the requested records.
    - The Ministry also agrees with the OIPC's ruling that the logs could disclose patterns and information about an employee's leave and other personal information that it is typically an unreasonable invasion of personal privacy to disclose.
    - The request for message logs was extremely broad; and the Ministry estimates it would have taken many years to process.
    - Government routinely releases government email addresses in other requests, other than those that may cause harm to an individual.

17. **How much was Mr. Loukidelis being paid to undertake this review?**
    - Mr. Loukidelis was paid up to a maximum of $50,000, including expenses.
    - His hourly rate is $300. (That does not include expenses)
    - Final cost will be available publicly.

18. **How did you appoint Mr. Loukidelis without going through procurement?**
    - Mr. Loukidelis performed this review as part of a legal services retainer.

- Legal Services Branch can enter into a retainer with individuals on a prequalified list who are licensed to practice law.
- As a lawyer, QC, former deputy attorney general and former privacy commissioner, not only is Mr. Loukidelis particularly qualified for this role, he is also on the pre-qualified list.

### 19. What was covered in the review?

- Mr. Loukidelis focused on four specific areas:
  - Provide advice to government in relation to the recommendations in the Information and Privacy Commissioner's report.
  - This includes any advice he may have about changes we should make to ensure compliance with records management and retention requirements.
  - Provide training for all ministers and staff, including those in the Premier's Office.
  - Make recommendations concerning the establishment of an ongoing review process to ensure we continually improve our records management practices.
  - Provide any other findings or advice that he may deem appropriate.

## Response to David Loukidelis Report - Communications Roll-Out

### Objective

To ensure public confidence in government's information management and FOI practices:

- accept all recommendations by Mr. Loukidelis and outline the path forward to address each recommendation
- outline the areas government will take even further actions that will strengthen government practices
- provide some degree of education about current practices and strength of existing tools and approaches to information and FOI management within government

### Approach

### Media Advisory

- For issue 3pm, Dec, 15 (will include link for report access – not live until Dec 16 at 9am)

### Technical Briefing (via province-wide teleconference) 9:30am

- Report made available to media (public post, on MTICS site, at 9:00am)
- Mr. Loukidelis to provide a walk-through of the report and answer any questions media may have (for attribution)

### Premier statement

- Issued at 10:30am

### Premier Availability (Vancouver at other event), 11:30am

- Premier responds to the report and announces the acceptance of the recommendations and further steps to be taken by govt
- Soundcloud – available for other media (after)
- Possible press gallery follow-up if needed (subject to feedback from Ben/matt)

### Social Media

- Initial tweet with link to PCC statement and graph (10:30am)
- End of day re-tweet
- Day two monitoring (determine at 9am, noon and 2pm) to determine if re-tweets of govt action required (if story is quiet – no tweet)

### Products

- Media Advisory (loukidelis avail only)
- Premier Statement (
- Recommendations/Actions Chart (for Public Post)
- Questions & Answers
- Key Messages
- Social media (tweets)....

# Highlights of BC Government's Response to David Loukidelis Report

| Loukidelis Report Recommendation | Government Actions |
|---|---|
| **Triple Deleting**<br>• Mr. Loukidelis recommended government issue a rule to prohibit the 'triple deleting' of emails | **Triple Deleting**<br>• The practice of 'triple-deleting' is now prohibited, subject to the identification and implementation of a permanent policy directive and technical solution |
| **Duty to Document**<br>• Mr. Loukidelis encouraged government to consider the Duty to Document after a period of careful study | **Duty to Document**<br>• Government agrees with Mr. Loukidelis's recommendations to study and consider the establishment of duty to document which is currently under review by the Special Committee to Review the Freedom of Information and Protection of Privacy Act |
| **Ministers & Political Staff - Records Management**<br>• Mr. Loukidelis suggested a public servant should oversee the collection of records for political staff | **Ministers & Political Staff - Records Management**<br>• Government accepts the recommendation for public servant oversight<br>*Further Action*<br>• As soon as procedures can be implemented, public servants will be additionally responsible for searching and identifying records responsive to information requests on behalf of ministers and political staff |
| **Retention of Emails**<br>• Mr. Loukidelis recommended government resist notion that all emails be kept | **Retention of Emails**<br>• Ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed |
| **Chief Records Officer**<br>• Mr. Loukidelis recommended Chief Records Officer position establishes guidance on information systems in order to assist all ministries in achieving compliance with the *Information Management Act(IMA)* | **Chief Records Officer**<br>• A new position of Chief Records Officer, along with responsibility for Information Access policy and operations, will reside in the Ministry of Finance to provide corporate oversight and guidance to all ministries related to the *IMA* and ensure alignment with the agency responsible for human resources across government |
| **Duty to Assist**<br>• Mr. Loukidelis recommended specific guidance to public servants on duty to assist in searching for records | **Duty to Assist**<br>• Office of the Chief Records Officer will begin work to develop service enhancements aimed at improving our duty to assist freedom of information applicants |

BRITISH COLUMBIA

# STATEMENT

### Premier's statement on freedom of information and records management improvements

VICTORIA – Premier Christy Clark made the following statement in response to David Loukidelis' recommendations to government on how to improve freedom of information policies and procedures and records management practices in response to the Privacy Commissioner's October, 22nd report:

"I have always been motivated by a commitment to ensure our government is open and transparent. We have taken many steps to enhance our laws, policies and procedures to meet this commitment.

"The Privacy Commissioner's report has identified specific areas in which we can improve, and Mr. Loukidelis has provided additional thoughts and recommendations on how best to implement these improvements. Today, I am announcing that we are accepting all of Mr. Loukidelis' recommendations, and will take further actions to ensure our records management and freedom of information practices meet public expectations.

"The practice of 'triple-deleting' will be prohibited, ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed. As soon as practicable, public servants will be made responsible for the searching of records responsive to information requests on behalf of ministers and political staff. Government also agrees with Mr. Loukidelis's recommendations to study and consider the establishment of duty to document which is currently under review by the Special Committee to Review the Freedom of Information and Protection of Privacy Act.

"Finally, the position of Chief Records Officer, along with responsibility for Information Access policy and operations, will reside in the Ministry of Finance to provide corporate oversight and guidance to all ministries and ensure alignment with the agency responsible for human resources across government. This office will also begin work to develop service enhancements aimed at improving our duty to assist freedom of information applicants.

"I am confident the actions announced today provide the assurance the public deserves to be confident government is operating in the most open and accountable manner possible."

**Contact:**

Sam Oliphant
Office of the Premier
250-952-7252

Jamie Edwardson
Ministry of Finance
250 356-2821

## Loukidelis Report Response

### Key Messages

- Government is motivated by a commitment to ensure we operate in the most open and transparent way possible.

- We have taken many steps to enhance our laws, policies and procedures to meet this commitment.

- More can always be done.

- The Privacy Commissioner's report has identified specific areas in which we can improve, and Mr. Loukidelis has provided additional thoughts and recommendations on how best to implement these improvements.

- We accept all of Mr. Loukidelis' recommendations and will go even further to ensure our records management and freedom of information practices meet public expectations including:

    - The practice of 'triple-deleting' will be prohibited.
    - Ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed.
    - As soon as practicable, public servants will be made responsible for the searching of responsive records to information requests on behalf of ministers and political staff.
    - Government will study and consider the establishment of duty to document.
    - The position of Chief Records Officer will reside in the Ministry of Finance to ensure alignment with the agency responsible for human resources across government.
    - Service enhancements aimed at improving our duty to assist freedom of information applicants will be implemented.

- I am confident the actions announced today provide the assurance the public deserves to be confident government is operating in the most open and accountable manner possible.

| | |
|---|---|
| **From:** | Bhullar, Barinder PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 9:16 PM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | Re: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 1:59 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

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| **From:** | Ives, Andrew PREM:EX |
| **Sent:** | Thursday, January 14, 2016 11:16 AM |
| **To:** | Carr, Steve PREM:EX |
| **Subject:** | RE: Memo from Premier Clark |

Apologies for the delay in response. Delay was due to the travel s.22

I have received this memo from the Premier. I understand and will abide by it.

Andrew

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

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|---|---|
| **From:** | Executive Update PSA:EX |
| **Sent:** | Wednesday, December 16, 2015 2:21 PM |
| **Subject:** | Executive Update: Freedom of Information and Records Management Improvements |



Where ideas work

*From the desk of John Dyble*

Today the Premier released a statement in response to David Loukidelis' recommendations to government on how to improve Freedom of Information policies and procedures as well as records management practices in response to the Privacy Commissioner's October 22 report.

The Premier reiterated her commitment to ensure government is open and transparent. To that end, all of Mr. Loukidelis' 28 recommendations have been accepted and further actions have been identified to ensure records management and Freedom of Information practices meet public expectations. Mr. Loukidelis' report is available on the Office of the Chief Information Officer website.

Mr. Loukidelis reiterated the importance of good records management practices, noting government sends and receives more than 280 million emails per year. While not all of these records need to be saved, it is important that every public service employee understand their records management responsibilities and manage their emails and other records appropriately.

Mr. Loukidelis noted some confusion across government about which records are transitory and can be deleted and which records must be kept. Effective immediately, the "triple deletion" of emails is prohibited. Further, in the coming months, the definition of transitory records will be revised and training will be held for all public service employees with respect to records management duties and responsibilities.

To lead this work, a new Chief Records Officer is being appointed at the Ministry of Finance. As the Chief Records Officer, Cheryl Wenezenki-Yolland will have responsibility for records management and Freedom of Information administration across government.  As government's first Chief Records Officer, Ms. Wenezenki-Yolland will lead the development of clearer guidelines for transitory records as well as work to improve government's practices with respect to assisting Freedom of Information applicants. In the interim, public service employees should continue to use their best professional judgement in the management of records. Information on records management is available:

- Government Records Service Guide: Transitory Records.
- Government Records Service Guide: Email Decision Diagram.

I also want to remind all public service employees to continue to assist applicants who make Freedom of

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Information requests. This duty starts with good records management practices, extends to conducting thorough and systematic searches for records whenever a request is received, and in the instances when records are not available in your ministry, identifying other areas of government where the records may exist.

More information on transitory records definitions and records management training will be distributed in the New Year. Any questions on records management practices should be directed to your ministry records management officer.

John Dyble
Deputy Minister to the Premier,
Cabinet Secretary and Head of the BC Public Service

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|---|---|
| **From:** | Executive Update PSA:EX |
| **Sent:** | Wednesday, December 16, 2015 2:21 PM |
| **Subject:** | Executive Update: Freedom of Information and Records Management Improvements |

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I also want to remind all public service employees to continue to assist applicants who make Freedom of Information requests. This duty starts with good records management practices, extends to conducting thorough and systematic searches for records whenever a request is received, and in the instances when records are not available in your ministry, identifying other areas of government where the records may exist.

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John Dyble
Deputy Minister to the Premier,
Cabinet Secretary and Head of the BC Public Service

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|---|---|
| **From:** | Oliphant, Sam PREM:EX |
| **Sent:** | Thursday, January 7, 2016 3:16 PM |
| **To:** | McCann, Meghan PREM:EX |
| **Subject:** | Fwd: Memo from Premier Clark |

Sorry this didn't make it into my scanned package but should have.

Sam Oliphant
Press Secretary
Office of the Premier

Begin forwarded message:

> **From:** "Oliphant, Sam PREM:EX" <Sam.Oliphant@gov.bc.ca>
> **Date:** December 17, 2015 at 12:57:04 PM PST
> **To:** "Carr, Steve PREM:EX" <Steve.Carr@gov.bc.ca>
> **Subject: RE: Memo from Premier Clark**
>
> I have received this memo from the Premier. I understand it and will abide by it.
>
> **Sam Oliphant**
> *Press Secretary*
> *Office of Premier Christy Clark*
> sam.oliphant@gov.bc.ca
> 250-952-7252

> **From:** Carr, Steve MNGD:EX
> **Sent:** Wednesday, December 16, 2015 2:00 PM
> **To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
> **Subject:** Memo from Premier Clark
>
> Good afternoon everyone,
>
> Please see the attached memo from the Premier.
>
> Please confirm that you have received it by replying the following to me in an e-mail:
>
> " I have received this memo from the Premier. I understand it and will abide by it."
>
> Let me know if you have any questions.
>
> Thank you for your attention to this matter,
>
> Steve Carr

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# Exceptions to Disclosure

### Section 12: Cabinet Confidences
A provincial government public body must withhold information that would reveal Cabinet confidences. This section also allows local public bodies to withhold information that was discussed at closed-door (in camera) meetings.

### Section 13: Advice or Recommendations
Section 13 allows a public body to withhold advice or recommendations.

### Section 14: Legal Advice
In the same way that communications with your lawyer is confidential, Section 14 allows a public body to withhold communications between itself and its legal counsel.

### Section 15: Law Enforcement
Public bodies may withhold information that would harm a law enforcement matter.

### Section 16: Intergovernmental Relations
Matters which could harm the relations between B.C.'s levels of government and governments from other provinces and jurisdictions may be withheld under this section.

### Section 17: Financial or Economic Harm
This section allows public bodies to withhold information which, if released, would cause financial or economic harm to the public body or to the government.

### Section 18: Conservation of Heritage Sites
Information about heritage sites which would result in the exploitation or destruction of those sites can be withheld from disclosure.

### Section 19: Harm to Individual or Public Safety
Information that could result in harm to any person's mental, physical or emotional health or to public safety can be withheld under this section.

### Section 20: Information Soon to be Published
A public body may withhold information from an applicant if it had already planned to release or publish information within 60 days, or if it is already for sale to the public.

### Section 21: Harm to Business Interests
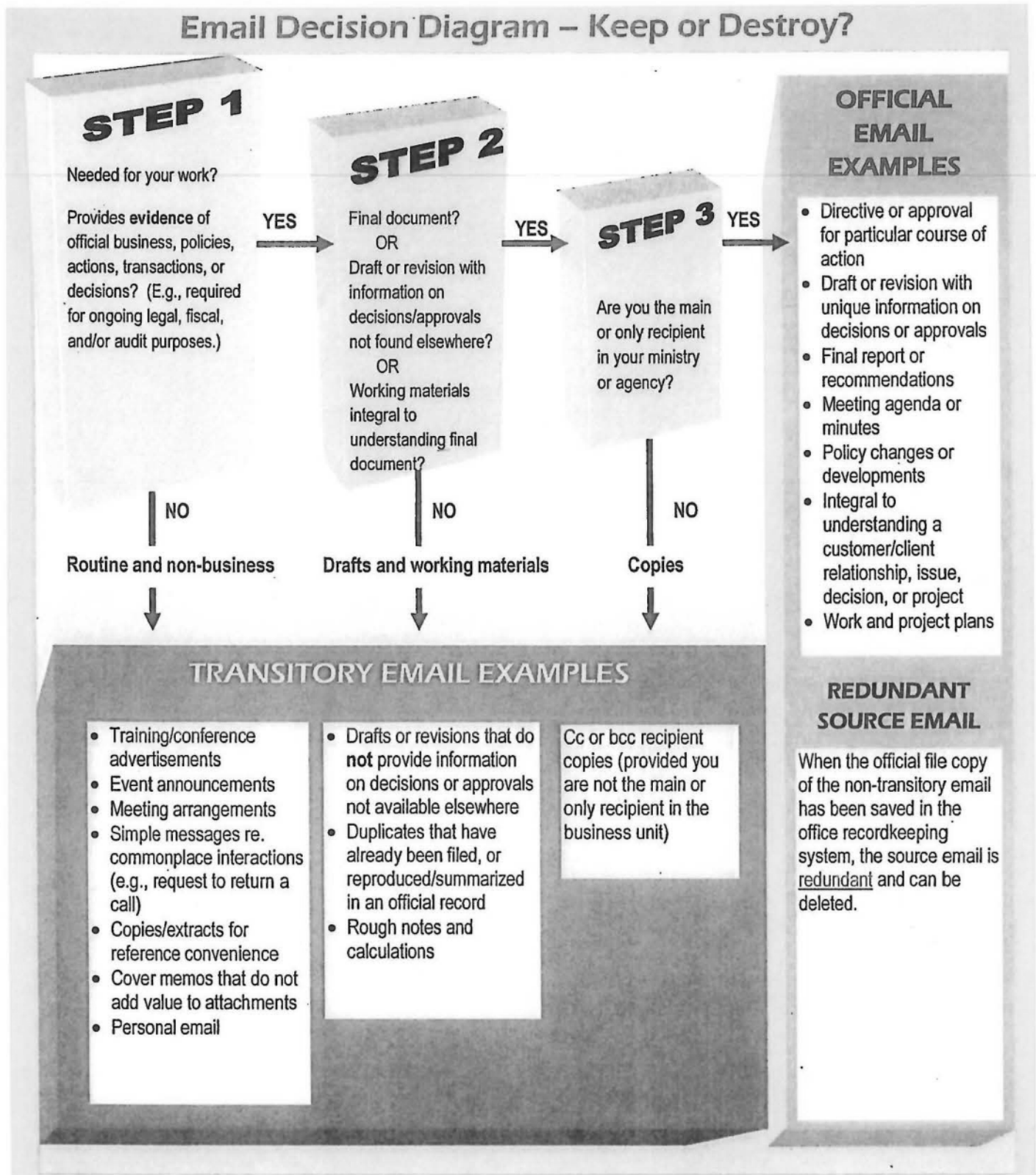Public bodies are often in possession of commercial or financial information of outside businesses and must withhold that information from an applicant if releasing it would cause harm to the business.

### Section 22: Harm to Personal Privacy
Your personal information belongs to you, and except in very limited circumstances, public bodies must not release your information to anyone but you.

# Email Decision Diagram – Keep or Destroy?

## STEP 1

Needed for your work?

Provides **evidence** of official business, policies, actions, transactions, or decisions? (E.g., required for ongoing legal, fiscal, and/or audit purposes.)

**YES →**

## STEP 2

Final document?
OR
Draft or revision with information on decisions/approvals not found elsewhere?
OR
Working materials integral to understanding final document?

**YES →**

## STEP 3

Are you the main or only recipient in your ministry or agency?

**YES →**

### OFFICIAL EMAIL EXAMPLES

- Directive or approval for particular course of action
- Draft or revision with unique information on decisions or approvals
- Final report or recommendations
- Meeting agenda or minutes
- Policy changes or developments
- Integral to understanding a customer/client relationship, issue, decision, or project
- Work and project plans

**| NO**

**Routine and non-business**

**| NO**

**Drafts and working materials**

**| NO**

**Copies**

### TRANSITORY EMAIL EXAMPLES

- Training/conference advertisements
- Event announcements
- Meeting arrangements
- Simple messages re. commonplace interactions (e.g., request to return a call)
- Copies/extracts for reference convenience
- Cover memos that do not add value to attachments
- Personal email

- Drafts or revisions that do **not** provide information on decisions or approvals not available elsewhere
- Duplicates that have already been filed, or reproduced/summarized in an official record
- Rough notes and calculations

Cc or bcc recipient copies (provided you are not the main or only recipient in the business unit)

### REDUNDANT SOURCE EMAIL

When the official file copy of the non-transitory email has been saved in the office recordkeeping system, the source email is redundant and can be deleted.

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**Additional Information:** Contact your Records Officer or check out the Records Management website – see especially the *Transitory Records Guide*.

**Doyle, Dan PREM:EX**

| | |
|---|---|
| **From:** | Executive Update PSA:EX |
| **Sent:** | Wednesday, December 16, 2015 2:21 PM |
| **Subject:** | Executive Update: Freedom of Information and Records Management Improvements |



Where ideas work

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John Dyble
Deputy Minister to the Premier,
Cabinet Secretary and Head of the BC Public Service

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| | |
|---|---|
| **From:** | Mann, Carter PREM:EX |
| **Sent:** | Tuesday, December 22, 2015 10:22 AM |
| **To:** | Carr, Steve MNGD:EX |
| **Subject:** | RE: Memo from Premier Clark |

I have received this memo from the Premier. I understand it and will abide by it.

---

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

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|---|---|
| **From:** | Kay, Maclean PREM:EX |
| **Sent:** | Friday, January 29, 2016 11:17 AM |
| **To:** | Carr, Steve PREM:EX |
| **Subject:** | RE: Memo from Premier Clark |

Hi Steve,

My apologies — I had thought I replied, but apparently I was mistaken.

I have received this memo from the Premier. I understand and will abide by it.

-Maclean

**From:** Carr, Steve MNGD:EX
**Sent:** Wednesday, December 16, 2015 2:00 PM
**To:** LP Chief of Staff; LP Ministerial Assistants; LP Executive Assistants
**Subject:** Memo from Premier Clark

Good afternoon everyone,

Please see the attached memo from the Premier.

Please confirm that you have received it by replying the following to me in an e-mail:

" I have received this memo from the Premier. I understand it and will abide by it."

Let me know if you have any questions.

Thank you for your attention to this matter,

Steve Carr

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|---|---|
| **From:** | Leamy, Michelle T  PREM:EX |
| **Sent:** | Wednesday, December 16, 2015 3:28 PM |
| **To:** | McDonald, Seanna MTIC:EX |
| **Subject:** | FOI Session |

Hi Seanna:  would Wes, Brad and/or Chad be available on Tuesday, Dec 22 between 9:30 and 10:30 to do a one-on-one FOI session with Minister Morris?  The Minister will be at PVO so we can do telepresence if that works better.  Thanks.  m

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|---|---|
| **From:** | Leamy, Michelle T  PREM:EX |
| **Sent:** | Thursday, December 17, 2015 5:24 PM |
| **To:** | Chan-Kent, Marissa PSSG:EX; Gill, Manjit PSSG:EX |
| **Subject:** | FW: Tues |

Update – Cheryl is confirmed to attend.  Materials will be sent to you either late tomorrow or Monday AM.  m

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**From:** Leamy, Michelle T PREM:EX
**Sent:** Thursday, December 17, 2015 5:07 PM
**To:** Gill, Manjit PSSG:EX; Chan-Kent, Marissa PSSG:EX
**Cc:** Olson, Alisha PREM:EX
**Subject:** Tues

FOI Session confirmed for Tues between 9:30 and 10:30 via telepresence (PVO/617).  Session will be conducted by Brad Williams, Executive Director with Information Access Operations along with Chad Hoskins, Senior Director, Access and Open Information.

Cheryl Wenezenki-Yolland, Associate Deputy Minister with Finance may also attend but this is not confirmed.

Materials will be sent directly to you prior to the mtg.

m

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# Leamy, Michelle T PREM:EX

| | |
|---|---|
| **From:** | Williams, Brad M MTIC:EX |
| **Sent:** | Monday, December 21, 2015 11:39 AM |
| **To:** | Gill, Manjit PSSG:EX; Leamy, Michelle T PREM:EX |
| **Cc:** | Chan-Kent, Marissa PSSG:EX; Hoskins, Chad MTIC:EX; Wenezenki-Yolland, Cheryl FIN:EX; Salling, Tammy L FIN:EX |
| **Subject:** | FOI Training Dec 22 |
| **Attachments:** | FOI Trg_Good Practice Tips for Calendars.pdf; Transitory Records Guide.pdf; Calendar Severing Guidelines.pdf; FOI Training_Leg MO staff_Dec 2015 (3).pptx |

Hello Manjit,

Here is the FOI training PowerPoint for our session tomorrow.

I have also included the Transitory Records Guide, Calendar Tips, and Calendar Severing Guidelines. We will not go through these during the session but they are helpful for reference.

Thanks, and please give me a call if you have questions.

**Brad Williams, CPA, CMA**
Executive Director | Information Access Operations
Ministry of Finance
*Ph:* 250.387.9807 | *e:* brad.williams@gov.bc.ca |
*m:* PO Box 9569, Stn Prov Gov, Victoria BC V8W 9K1

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# Good Practice Tips for Managing and Maintaining Calendars

This Good Practice Tips sheet is intended to provide tips to employees who are responsible for managing and maintaining calendars.

*General Tips and Good Practices:*

❑ Do not sever non personal information out of a calendar, let IAO help you.

❑ Avoid the use of any personal or editorializing comments in making calendar entries.

❑ Anything to do with the business of government must be shown in the calendar – Monday to Sunday – 24 hours a day.

❑ Do not include appointments of other people. (i.e. Minister or Deputy Minister).

*Recording Entries:*

❑ Ensure that calendar entries are **clear** and **consistent** at time of entry.

❑ Be **clear** about the subject of the meeting and who is expected to attend. Keep the meeting subject concise. More information may lead to unnecessary redaction.

*Examples:*

◆ **Concise entry** – "Meeting with John Smith, EFO, on Citizen Engagement"

This entry can likely be released in full.

◆ **Unnecessary degree of detail** – "Meeting with John Smith, EFO, re: cabinet submission on Citizen engagement"

Based on this entry, IAO would be required to make a determination as to whether to redact the entry and it would be necessary to contact the calendar owner's office, and possibly the Office of the Premier, for further information.

❑ Be **consistent** at the time of entry – all those attending the meeting should have the same or similar calendar entry. When arranging meetings with other staff, provide a standard title for the meeting and ask that the other office use this title in recording the meeting - this promotes consistency across calendars in how the meeting is recorded and relayed to citizens.

◆ Tip: Consider using the Outlook "meeting request function" to schedule meetings; this will automatically assign the same title and description to the same meeting.

*Personal Appointments:*

❑ Consider recording personal appointments (doctor or dentist appointments, children's events, etc.) as "*Private*" in the Outlook calendar which means that the printed record will simply show "private", but the details of the entry will appear to the calendar owner (and anyone else with full access to the calendar).

◆ Caution: Ensure that only personal appointments are labeled as *private*. Calendar records must be accurate and are subject to a formal access request under the *FOIPPA Act*.

❑ Delete *Private* or personal appointments after they occur.

◆ Note: *Private* or personal appointments need to be redacted from a Calendar record. Deleting *private* or personal appointments after the appointment has occurred eliminates the need for IAO to redact the record.

### *Keeping Calendars Current:*

❑ A calendar is a planning document to record scheduled meetings and events and who is expected to attend. To promote accuracy and completeness, the calendar record should always be current by updating the calendar as changes occur.

*Examples:*

◆ Delete meetings that did not occur, or where the calendar owner (or their representative) did not attend;
◆ 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.

❑ Calendars should be maintained when the calendar owner is on leave or otherwise absent. 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.

### *Point of Contact for IAO:*

❑ Ministers', Deputy Ministers' and ADM's offices are asked to designate a primary and secondary contact for the IAO to respond to questions as necessary.

# TRANSITORY RECORDS

Many records do not need to be retained. The <u>Transitory Records Schedule</u> authorizes you to dispose of records of temporary value as soon as their business use ends. This guide will help you identify these records.

## What is a transitory record?

Transitory records are **records of temporary usefulness** that are needed only for a limited period of time in order to complete a routine action or prepare a final record.

As with all records, they can exist in **any format or medium** (paper or electronic), and can be created and shared using a variety of technologies (e.g., email, social media, Live Meeting, SharePoint, wikis).

Transitory records **are not required** for financial, legal, audit or statutory purposes and are not regularly filed in the <u>office recordkeeping system</u>.

They do not need to be filed using the *Administrative Records Classification System* (*ARCS*) or your office's *Operational Records Classification System* (*ORCS*).

**Examples of transitory records:**

- o advertising material
- o announcements of social events
- o cc copies (unless you are the main staff member responsible for the matter)
- o copies created for convenience/reference purposes
- o email conveying an attachment (providing it doesn't add value to the attachment)
- o meeting arrangements
- o personal messages
- o simple messages reflecting commonplace interactions (e.g., a request to call someone)
- o outlines, calculations, preliminary notes and other rough content used to prepare a final record
- o drafts and revisions that are not needed to document decisions and associated approvals
- o routine correspondence about drafts and revisions

See the Quick Reference Guide on last page for more examples.

## Who can apply this schedule?

You can! You simply need to use your judgment to determine whether a record is, or is not, transitory. The authority to identify transitory records is delegated to each BC government employee.

> **However: DO NOT destroy any transitory records that are relevant to a *FOIPPA* request or legal discovery.**

# TRANSITORY RECORDS

## What isn't a transitory record?

A record's content and context determines whether it is transitory, not its format or storage medium. If an email, significant draft, or other record is essential to understanding government business, e.g., how a particular decision was reached, then the record is non-transitory and must be kept.

Non-transitory records need to be filed and saved in accordance with the appropriate government records schedule (i.e., *ARCS/ORCS* classification).

**Examples of non-transitory records:**

- o work unit activities documentation (e.g., work schedules, assignments, etc.)
- o useful information that helps explain the history of a relationship, decision or project
- o drafts or revisions with information about a decision or associated approvals that is unavailable elsewhere (e.g., directions to change a proposal and recommend a different course of action)
- o a final report with recommendations
- o formal communication about official business
- o policies and directives
- o decision records, instructions, and advice
- o meeting agendas and minutes
- o documentation of a policy matter or how a case was managed
- o documentation of initiation, authorization, or completion of business transactions
- o documentation that is evidence of a significant action (e.g., verification or approval to proceed)

## Why Managing Transitory Records Is Important

By promptly removing transitory records, employees are better able to identify and file key records into their office recordkeeping system, where they can be easily found. As well, government avoids unnecessary costs for storing and processing transitory records.

## Additional Information

Contact your Records Officer or check out the other RM Guides.

## Quick Reference Guide to Transitory Records

| | WHAT | SHORT DEFINTION | EXAMPLES |
|---|---|---|---|
| 1. | **Records of Short-term Use** | Records created or received for informational purposes only; OR convenience copies for reference or ease of use (i.e., the official copy has been filed in the <u>office recordkeeping system</u>) | ° Messages (e.g., email, voicemail, instant messages) that are not required to document a decision, action, or transaction<br>° Duplicate copies, partial copies or extracts no longer needed for reference purposes<br>° Input source documents no longer required |
| 2. | **Working Materials, Drafts, and Revisions** | Preliminary versions and supplementary documentation used to prepare a final document, which DO NOT indicate new decisions or provide approvals and are not specified in another records schedule (e.g., <u>ARCS</u> or your <u>ORCS</u>) | ° Drafts and revisions that provide no information on decisions or approvals that cannot be found elsewhere<br>° Rough notes, calculations, outlines, lists of ideas or suggestions<br>° Newspapers or magazines used for compiling daily 'news clippings' (physical or electronic) |
| 3. | **Advertising and Promotional Material from the Private Sector** | Advertising and promotional material from businesses or business professionals which DOES NOT relate to a transaction with a private sector provider | ° Company profiles, pamphlets<br>° Direct mail/email notices and bulletins<br>° Catalogues<br>° Free trial CDs and DVDs<br>° Course and seminar announcements |
| 4. | **Supplies of BC Government Publications and Blank Forms** | Stocks of publications and blank forms which have no further usefulness | ° Blank forms, including blank e-forms and e-templates<br>° Blank stationary with out-of-date information<br>° Out-of-date published material (e.g., pamphlets, brochures, and newsletters) |

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### Dispose of Transitory Records as soon as you are finished with them!

# Severing Guidelines - Calendar Entries

| ENTRY OR DESCRIPTION OF ENTRY | SEVERED OR NOT SEVERED |
|---|---|
| Blackberry/cellphone numbers for government employees | **Severed** under section 17 – Blackberry/cellphone numbers that constitute "business contact numbers" (i.e. they are part of a signature block) will be disclosed but "confidential, unlisted" Blackberry/cellphone numbers will be withheld under section 17. The financial harm to the public body is the high cost of constantly changing these phone numbers after every FOI request. |
| "Cabinet" or "Cabinet Retreat" | **Not Severed** – there is not enough information in this entry to reveal the substance of deliberations of the Executive Council or its committees. |
| "Chambers" as a subject | **Not Severed** |
| "Chambers" as a location | **Severed** under Section 15 |
| Constituency related / Entries in a <u>Minister's</u> calendar that relate to his/her duties as a Member of the Legislative Assembly | If the request is worded for the calendar of "the Minister" it is appropriate to consider these entries **Not Responsive** to "the Minister's" calendar. |
| Confirmation numbers, Reservation numbers, frequent flyer numbers, etc | **Severed** under sections 17, 22– Most external to government organizations will readily provide additional information regarding a reservation/booking/account provided that you are able to provide these numbers. There is a financial harm to the public body if its credit information is divulged and there is an unreasonable invasion of privacy given that there is a personal credit verification required in order to obtain a corporate travel card. |
| Accommodation details | **Severed** under section 15 |
| Meeting location details | **Severed** under section 15 |
| Working from "Home" | **Severed** under section 15 "Home" (only) |
| "WFH" (acronym for working from home) | **Severed** under section 15 in its entirety |
| "Caucus"<br>"House"<br>"House Business Update"<br>"Duty House Leader"<br>"House Duty" | **Severed** as Not Responsive in a Minister's calendar only;<br><br>**Not severed** in any other calendar |
| Entries that relate to the exercise of the duties/functions of an Officer of the Legislature (see Schedule 1 definition) under an Act | **Severed** under section 3 (in any calendar) |
| Unpublished direct telephone numbers for Minister, DM, ADM, etc. | **Severed** under section 17 - see comments for severing Blackberry/cellphone numbers |
| "Private Appointment" (as a stand-alone term) | **Not severed** |
| *Details* of a personal appointment | **Severed** under section 22, as appropriate |
| "Issue Prep with Staff" | **Not Severed** |
| "QP", "QP Prep", "QP Briefing" | **Not Severed** |

# Severing Guidelines - Calendar Entries

| ENTRY OR DESCRIPTION OF ENTRY | SEVERED OR NOT SEVERED |
|---|---|
| Teleconference information: <br> - Dial- in Number <br> - Conference Reference <br> - Participant Conference Access Code <br> - PIN or moderator's code | **Severed** under sections 15, 17 <br> **Severed** under sections 15, 17 <br> **Severed** under sections 15, 17 <br> **Severed** under sections 15, 17 |
| Telephone numbers (including cell numbers)/ email addresses for people representing an organization (union, association, etc) <br><br> *Personal cell numbers for people representing an organization, where they are clearly identified as such | **Not Severed** –business contact information is not personal information; <br><br><br> **Severed** under section 22 |
| "Throne Speech" | **Not Severed** –the Throne Speech is considered an event that a Minister attends in both capacities (MLA and Minister). |
| "Treasury Board" | **Not Severed** – there is not enough information in this entry to reveal the substance of deliberations of the Executive Council or its committees. |
| "John Smith – vacation, Jane Doe Acting" | **Severed** under section 22 - "vacation" <br> **Not Severed** - "Jane Doe Acting." |
| EDO days of staffers <br> (i.e. "John Smith – EDO" | **Severed** under section 22 in its entirety |
| File paths printed on bottom of attachments | **Not Severed** - If a harms assessment determines that the security of a system would be harmed by releasing information included in a file path, the information will be withheld under section 15. This would not generally be the case, as a file path alone doesn't reveal certain specifics that would be required to identify the server which a mapped drive resides on. |
| 360's (performance review), mentoring, EPDP | **Severed** under section 22 |
| Staff/Christmas parties during business hours | **Not Severed** – the assumption here is that these parties are paid for using public funds and attended by staff within their paid hours of work. |
| Staff/Christmas parties outside of business hours | **Severed** under section 22 – the assumption here is that these parties are paid for using personal funds and attended by staff outside of their paid hours of work. |

# Severing Guidelines - Calendar Entries

## Request Dependent Section

In some circumstances, the approach for severing calendar entries will be dependent on the wording of the applicant's request. If a Minister's calendar is requested and there are entries that relate to that individual's duties/functions as a Member of the Legislative Assembly, they would not be responsive to the request. If an applicant agrees to exclude phone numbers and email addresses from their request for a calendar, they would not be responsive to the request. The above are only intended to be examples of circumstances where it would be appropriate to use "not responsive" to remove information in response to an FOI request for calendars (i.e. they do not constitute an exhaustive list).

# Freedom of Information

## December, 2015

BRITISH COLUMBIA | Ministry of Finance

Trusted financial and economic leadership for a prosperous province

## FREEDOM OF INFORMATION

1. What you need to know about the FOI Act

2. Records Management

3. FOI

4. How the FOI process works

5. Trends in FOI

6. Calendars

7. Open Information

8. FOI Contacts

# PURPOSES OF THE ACT

**Accountability to the Public**

- Legislated right to access all government records - specifying limited exceptions (i.e. make what is commonly referred to as an 'FOI request')

**Protection of Privacy**

- Provides a right of access to individuals own personal information
- Regulates how public bodies collect, use and disclose personal information
- Right to request correction of personal information

**Independent Oversight by the Office of the Information & Privacy Commissioner**

- Conducts reviews on decisions regarding disclosure

# Purposes of the Act



ACCOUNTABILITY

RIGHT OF ACCESS TO RECORDS

PRIVACY

PREVENT UNAUTHORIZED COLLECTION, USE OR DISCLOSURE OF PERSONAL INFORMATION

INDEPENDENT OVERSIGHT

## WHO IS COVERED BY THE ACT

**All** provincial ministries, and most provincial agencies, boards, commissions, Crown corporations and smaller agencies

**Local public bodies**

- School Districts
- Colleges and universities
- Regional health boards

**Self-governing professions and occupations**

- Teachers
- Doctors
- Nurses

➢ Government is only responsible for requests to BC government ministries

## WHAT RECORDS ARE COVERED BY THE ACT

All records in the **custody** or under the **control** of a public body

### What is a Record?

- Any information recorded or stored by any means whether in hard copy or in electronic format

- Regardless of content and subject matter, the following are subject to an FOI request:
  - briefing notes
  - vouchers
  - telephone records
  - notebooks/daybooks
  - contractor records
  - email
  - records on your smart phone
  - transitory records

## REQUIREMENT TO RETAIN RECORDS

➢ On December 16th, 2015, the Premier issued a directive on the retention of emails:

- The practice of 'triple-deleting' will be prohibited, ministers and political staff will continue to retain sent emails and a new policy and specific training will be developed.

## RECORDS MANAGEMENT

➢ Records created or received while doing Government business must be managed according to legislation, litigation requirements and Government policy and are subject to FOI and Government policy regardless of where they are located.

- Government email must be conducted using approved Government email systems, not personal email systems. This is essential for information security, privacy protection and effective management of the information

- Government records that are not transitory should be filed in the office's record-keeping system (e.g., TRIM or LAN) and must not be destroyed without an approved schedule (e.g., ARCS/ORCS) or before the schedule allows

- Employees must keep Government records separate from material relating to ministers' constituency matters, legislative committee involvement and other MLA activities. Those, and personal (e.g., family) records, are not Government records
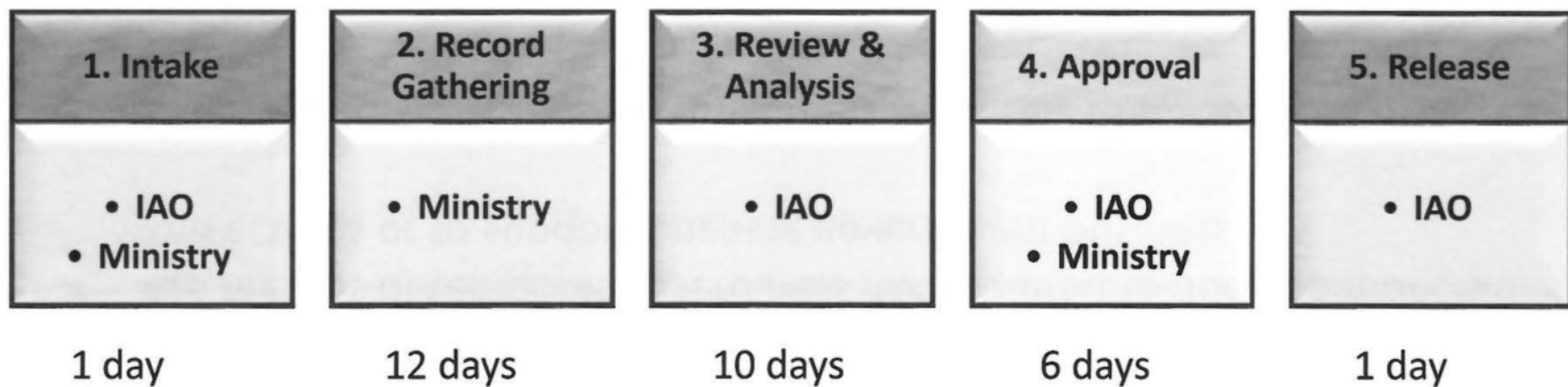
## TRANSITORY RECORDS

- Are records of temporary usefulness not required to document decisions and actions or to support ongoing government business

- The Transitory Records Schedule does not apply to personal or MLA records

- Once an FOI request has been received, transitory records are subject to the FOI Act and cannot be deleted.

# CROSS GOVERNMENT REQUEST – TIMELINES

## 30 DAYS!

| 1. Intake | 2. Record Gathering | 3. Review & Analysis | 4. Approval | 5. Release |
|-----------|---------------------|----------------------|-------------|------------|
| • IAO<br>• Ministry | • Ministry | • IAO | • IAO<br>• Ministry | • IAO |
| 1 day | 12 days | 10 days | 6 days | 1 day |

*Unless.................*

The request necessitates a 30 Day Extension under the Act ➤

## WHAT HAPPENS WHEN AN FOI REQUEST IS RECEIVED?

- Standard Call for Records Forms and Guidelines for record submissions are provided to all ministry program areas

- Ministry responsibilities include provision of the following information to IAO:

    o where search for records was conducted (i.e. TRIM files, databases, off-site records)

    o duration of search time by ministry program area

    o who conducted the record search

    o potential HARMS that could result from disclosure of records gathered

    o ISSUES associated with disclosure of records gathered

    o regional locations where records pertaining to this request may reside

# DUTY TO ASSIST AND ADEQUATE SEARCH

- Duty to assist involves making every reasonable effort to assist applicants and responding without delay openly, accurately and completely. Duty is shared by IAO and client ministries, and is facilitated by good communication between the parties.

- Adequate search involves making reasonable interpretations of applicants' FOI requests, requesting clarification when applicants' requests are unclear, and then performing a reasonable search for the requested records.

- In limited circumstances, duty to assist requires creation of a record.

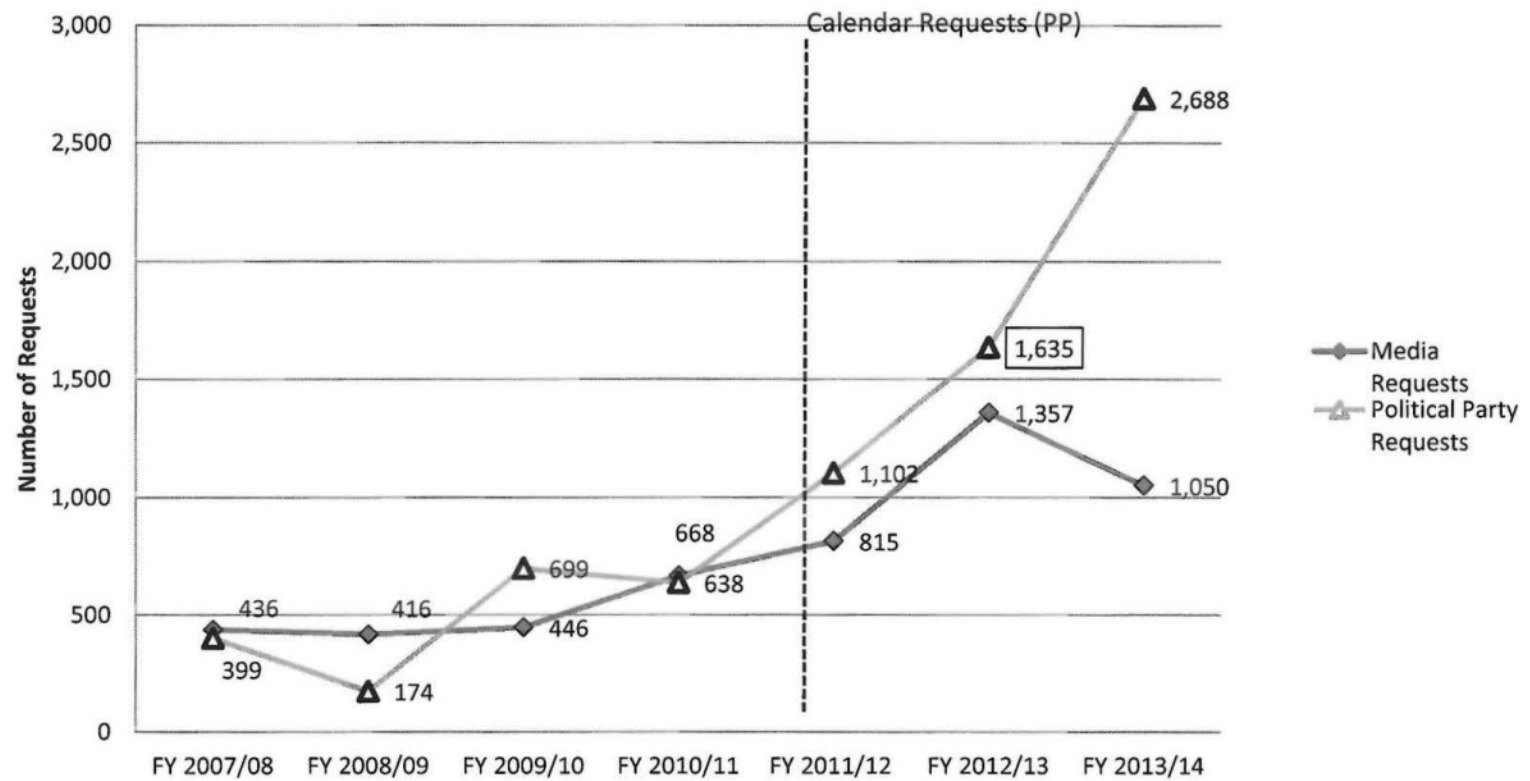| Mandatory Exceptions | |
|---|---|
| Section 12 | Cabinet confidence |
| Section 21 | Third party business information |
| Section 22 | Personal information |
| **Discretionary Exceptions** | |
| Section 13 | Policy advice/recommendations |
| Section 14 | Legal advice |
| Section 15 | Law enforcement |
| Section 16 | Intergovernmental relations |
| Section 17 | Financial or economic interests |
| Section 18 | Heritage sites |
| Section 19 | Personal health or safety |
| Section 20 | Information soon to be published |

## FOI APPROVAL PROCESS

- FOI requests are sent to program areas (ministries) for review and sign-off

- The DM or delegated head of the public body is responsible for final sign-off on all requests

- The DM or delegated head of the public body exercises discretion with respect to disclosure recommendations

# DEMAND FOR FOI REQUESTS CONTINUES TO INCREASE

| Fiscal Year | General Requests | Personal Requests | Total Requests Received | % On-Time | % No Records Responses |
|---|---|---|---|---|---|
| 2009/10 | 2,532 | 5,122 | 7,654 | 90 | 21 |
| 2010/11 | 2,756 | 5,073 | 7,829 | 93 | 24 |
| 2011/12 | 3,329 | 5,094 | 8,423 | 90 | 21 |
| 2012/13 | 4,815 | 5,484 | 10,299 | 87 | 25 |
| 2013/14 | 5,200 | 4,400 | 9,600 | 74 | 19 |
| 2014/15 | 4,124 | 4,151 | 8,275 | 79 | 17 |

# CHANGING NATURE OF FOI APPLICANTS

## Requests from Political Parties and Media



Calendar Requests (PP)

| | |
|---|---|
| Media Requests | |
| Political Party Requests | |

Data points shown on chart:

Political Party Requests: 436, 174, 699, 668, 1,102, 1,635, 2,688

Media Requests: 399, 416, 446, 638, 815, 1,357, 1,050

X-axis: FY 2007/08, FY 2008/09, FY 2009/10, FY 2010/11, FY 2011/12, FY 2012/13, FY 2013/14

Y-axis: Number of Requests (0 to 3,000)

## CALENDAR MANAGEMENT

> Government generally receives monthly or bi-monthly requests for DM, ADM and ED calendars and about 25 positions in the Office of the Premier. In November 2013, calendars for Ministers' Office Executive Assistants were included.

OUTLOOK CALENDARS

- Be wary of embedded documents, as the calendar and the attachments have different life spans

- Ensure calendar consistency and clarity
    - be clear about the subject of the meeting and who is expected to attend
    - keep the meeting subject concise

- Keep calendars current
    - update the calendar as changes occur
    - delete meetings that did not occur or were not attended
    - update the calendar to record the names and titles of individual(s) who actually attended the meeting as the calendar owner's representative

- Personal appointments
    - mark as "private" – details will not show up in a printed copy or to anyone other than the calendar owner or a delegate
    - caution – ensure that only personal appointments are labeled as "private". Calendar records must be accurate and are subject to a formal access request under FOIPPA
    - consider deleting "private" or personal appointments immediately after they occur

## OPEN INFORMATION

- Introduced July 2011 with policy guidelines

- Over 5,000 General FOI requests posted (no Personals)

- Over 1,700 Minister and Deputy Minister travel expense summaries posted

- Over 21,000 visits to and 15,000 downloads from the Open Information website in 2013/14

- Proactively released 48 per cent of eligible general requests in 2013/14

- Requests are exempt from publication due to security concerns (82 per cent), business information (10 per cent), and personal information (7 per cent)

**Brad Williams, Executive Director, FOI**          **250 357-9807**

**Chad Hoskins, Senior Director, FOI**          **250 356-7343**

## FOI Managers:

| Sector | Manager | |
|---|---|---|
| Justice/Social | Kris Ghag | 250 387-9801 |
| Central Agencies | Cindy Elbahir | 250 952-6355 |
| Natural Resources | Ken Bejcek | 250 387-0572 |
| Business/Infrastructure | Russ Fuller | 250 387-4503 |
| Health/Education | Maxine Vanzetta | 250 387-9805 |
| Personals | Vivian McDonald | 250 356-6266 |
| Intake/Open Information | Cindy Kukucska | 250 387-7356 |

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