

Prioritizing

Due to the high number of requests you receive in this role, you need to effectively prioritize the most valuable requests. One way to prioritize is according to who has sent you the request. Here is a possible order in which to prioritize requests:

1. Director of Operations (Martin Schlaepfer)
2. Deputy Minister (Serge Imbrogno)
You should prioritize the deputy's requests a very close second to the director's, and sometimes prioritize the deputy's requests first if he asks for something on short notice.
3. Executive Assistant (EA) to your division (Hilary Cox)
4. Assistant Deputy Minister (ADM) of your division (Steen Hume)
Different ADMs will have different preferences for how much they want to directly contact DMO SPAs (Senior Policy Advisors)
5. Legal Director (Maud Murray)
When you receive briefing products directly from Legal Services, it is often quite important to brief the deputy and director on these quickly – the same day at the latest usually
6. Chief of Staff (Andrew Teliszewsky)
7. Policy Advisors from the Minister's Office (the ESP PA is Craig Ruttan)
8. EAs of other divisions
9. Other DMO SPAs
10. Cabinet Office or work related to Cabinet committees (like MTCC or LRC)

Briefing the Deputy

Preparing

- Strive to read products thoroughly before briefing the deputy. This often isn't possible. If you're uncertain whether you should prioritize speed or thoroughness, ask your director (Martin).
- When you're able to review products before briefing the deputy, it may help to correct small typos as you see them – showing the deputy a product with fewer errors reduces distractions and allows the deputy to focus on content.
- Anticipate questions that the deputy may have about the context of a request and bring the supporting materials (e.g., the email request from MO or a supplementary document that the main document refers to).
- Bring 2-3 copies of information products – one for the deputy, one for you, and possibly one for the director if you anticipate they will want to give input.
- Bring a system for quickly recording the deputy's feedback – a notepad, or some prefer to mark up products directly.
- Assume that most of the information you receive, even as FYI, you should brief the deputy on – if you're not sure, ask the director.

Briefing

- When time with the deputy is limited, prioritize the most urgent items first.
- Provide brief context to help the deputy understand who is asking for what.
- Some advisors prefer to let the deputy know when they haven't had a chance to review a product in advance when they first introduce the product.
- Listen carefully and write down the deputy's comments quickly because it may be difficult to get him to repeat them.
- Make your own notes on products even if the deputy is marking up a product because his writing is difficult to decipher.
- If you'll rely on the deputy's notes on a product, review them right after you receive them in case you need to ask him to clarify his writing.

Strive to delegate the deputy's requests as soon after he gives them as possible.

SharePoint and Deputy's Day Binder

Ensure that all briefing products for the next day (related to your files) are copied/uploaded to the SharePoint the day before the meetings, and print a copy of each for the deputy's day binder (also the day before). If you have clearance, you can access the SharePoint at:

<https://intra.sse.gov.on.ca/sites/ene/collab/DMO/DMOCollab/DayBinder/Forms/AllItems.aspx>

Approvals

You should assume that you need the deputy's approval for all products, and also to proceed with most of the requests you receive (e.g., from the Chief of Staff or from policy advisors in the Minister's Office). If you're not sure, ask the director.

When you receive requests directly from the Chief of Staff, consult with the director as soon as possible for guidance.

Similarly, you can't assume that you have clearance to proceed with requests from the Minister's Office policy advisors (e.g., Craig Ruttan) without first checking with the deputy – the DMO may have a different perspective on best to proceed, and may also have vital strategic information to help guide the work.

Daily Routine

- It may be quite useful to look at the deputy's calendar and your own for this day and the next at the start of each day.
- As early as possible in the day, please send the ESP EA the daily "menu", which is a list tracking ESP deliverables to DMO in order of urgency.

Meetings

Scheduling

- The first step in handling a meeting request is normally to get approval to schedule the meeting – you will normally need to check with the deputy (or at least director) for approval to schedule a meeting (regardless of the source of the request, like from the Minister's Office, for example).
- Once you have received approval, send the Office Manager (Francesca Bungaro-Yemec) the information they need to schedule the meeting:
 - Exact title of the meeting
 - Date
 - Attendees (including external invitees, like from the IESO or OEB)

Preparing

- The Minister, Chief of Staff, and Deputy expect briefing products to support the large majority of meetings.
- If an external party (like the IESO or the OEB) needs to prepare the product, you should draft an email request that the director can send to the external party requesting the briefing product. Otherwise, you will request the product from your division, or from multiple divisions and either nominate a lead EA to coordinate, or let EAs determine amongst themselves who will coordinate.
- Set specific deadlines for your requests in order to track them and obtain compliance more readily.
 - For Minister's briefing products, it is essential to send a first draft to the Minister's Office at least one week in advance.
 - For "DM-CoS" products, it is normally acceptable to share 2-3 days in advance, but you may want to assign earlier deadlines for products that you anticipate may be of high interest or require multiple rounds of revisions.
- You need to ensure that there will be copies of materials at the meetings – normally this is the EA's role, but for meetings with other stakeholders or ministries, it may be *your* responsibility to print the copies.

Coordinating with External Stakeholders and other Ministries

Almost all coordination with external stakeholders, agencies (e.g., IESO and OEB) and other ministries should be routed through the director – when you're unsure, ask the director.

Coordinating/Delegating Correspondence

Correspondence can be grouped into two categories – stuff the chief of staff cares about, and stuff he doesn't.

You should prioritize anything you receive from the chief of staff, whether from him directly, from the director, or via the Correspondence team. For CoS requests, the DMO SPA (i.e., you) should give any strategic guidance required to the Correspondence team who will in turn delegate the work to division(s) and copy you (if the CoS submitted the request directly to Correspondence, Correspondence will first consult the DMO SPA for any relevant guidance).

- Be sure to copy the DMO Communications advisor (currently Denna Berg) on all communication between you and Correspondence and division because it is their responsibility to track CoS-requested correspondence (because the CoS tends to track correspondence deadlines closely).

For all other correspondence, the Correspondence team coordinates and tracks the work and the DMO SPA will generally not be informed and the DMO Communications advisor does not track it.

“Bi-weekly” Meeting Between ESP and MO (“ESP-MO 1:1”)

The policy advisor in the Minister's Office responsible for your division's files may want updates on files for which there has been no recent briefing.

It is essential that you get the deputy's approval for the meeting agenda topics. First, get the MO advisor to propose agenda items (ideally, at least 4 days before a meeting) and check with the division EA (currently Hilary Cox) – the EA may flag concerns with agenda items that you in turn might want to flag for the deputy.

Get the deputy's approval on the agenda items, and then update the meeting invitation to include the agenda items so that the division knows which directors and/or managers to bring to the meeting.

Note: The Deputy is very clear, and staff clearly understand, that this meeting is not an appropriate venue for agreeing to explore new policy options. This ensures alignment within the MO – it's essential that the CoS approves all MO policy requests. Division staff can still agree to provide small follow-ups, but you should run any major requests coming from this meeting by the deputy/director.

References:

1. *Energy MO Policy Leads* – lists which policy files belong to which MO policy advisor
2. *Policy Tracking Matrix* – provides a status overview of all active policy files across all divisions (discussed in a CoS-DMO meeting every 2-4 weeks). The attached version may be outdated by the time of reading.
3. *Green Sheets* – the Ministry of Energy's Cabinet Liaison (currently Sam Yordi) tracks ENERGY work regarding Cabinet committees
4. *Cabinet/Committee Calendar* – committee and Cabinet meeting dates are subject to change, but this calendar otherwise provides the dates possibly available to ministries to bring submissions to committees and/or Cabinet. The committees that ENERGY is most likely to present to are:
 - Treasury Board/ Management Board of Cabinet (TB/MBC);
 - Legislation and Regulations Committee (LRC);
 - Minister's Table: Climate Change (MTCC); and
 - (Maybe) Jobs and Economic Policy Committee (JEP).



Energy MO Policy
Leads v2.docx



Policy Tracking
Matrix for Aug 4 - Cle



2017-08-10 Energy
Tracking.xlsx



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