

5 - Email - January 27 2017 - Re_ Release.pdf

From: [Patricia O'Malley](#)
To: [Tam, Nelson \(TBS\)](#)
Subject: Re: Release
Date: January-27-17 3:02:15 PM

If I am asked, which I have not been so far, I will say that I don't think it has been settled yet.
The other is not true.

Tricia O'Malley
Mobile +1(416) 570 1924

From: Tam, Nelson (TBS)
Sent: Friday, January 27, 2017 14:58
To: Patricia O'Malley
Subject: RE: Release

Patricia

I have been advised if the AG asked about the release timing, your response is – you don't have any information regarding the timing of the report release.

Thanks

Nelson
416-212-0514

From: Patricia O'Malley [<mailto:plomalley@outlook.com>]
Sent: January-27-17 12:09 PM
To: Tam, Nelson (TBS)
Subject: Re: Release

Thanks. The 13th or 14th would be good for me as I will have to be in TO on 14th to travel to Ottawa for meeting of federal AG committee on 15th.
I think I am the safe in assuming no activity for week of 6th? Which means that only Uros and I will be available for briefings.

T

Tricia O'Malley
Mobile +1(416) 570 1924

From: Tam, Nelson (TBS)
Sent: Friday, January 27, 2017 12:02
To: Patricia O'Malley
Subject: RE: Release

Patricia

The timing/strategy has not been confirmed.

Preliminary plan - Communications is working towards a release of February 13 with

media technical briefing by the Panel. The Opposition briefing will be prior to the media briefing on the same day.

AG Messaging – the release date has not been confirmed but expected in early February.

I will keep you updated if I hear anything. Communications are working on the materials for the release including Q&A's.

Thanks

Nelson
416-212-0514

From: Patricia O'Malley [<mailto:plomalley@outlook.com>]

Sent: January-27-17 11:56 AM

To: Tam, Nelson (TBS)

Subject: Release

Nelson

Any news yet about timing of release and media/opposition briefing? You have seen that we are confirmed with the AG for next Friday.

Tricia O'Malley
Mobile +1(416) 570 1924

7 - Email - January 31 2017 - FW_ Panel - Stakeholder and AG Engagement Plans - Decisions Needed.pdf

From: [Hosick, Sarah \(TBS\)](#)
To: [Tam, Nelson \(TBS\)](#)
Subject: FW: Panel - Stakeholder and AG Engagement Plans - Decisions Needed
Date: January-31-17 6:59:20 PM
Attachments: [PAEAP Report Stakeholder Engagement Plan v1.docx](#)
[PAEAP - Comms Material for DM Briefing.msg](#)
[Proposed AG Engagement after Pension Panel.docx](#)

FYI

From: Hosick, Sarah (TBS)
Sent: January-31-17 6:03 PM
To: Laughton, Patrick (TBS)
Subject: Panel - Stakeholder and AG Engagement Plans - Decisions Needed

Hi Patrick,

I've attached two documents:

- 1) Draft Stakeholder Engagement Plan that Comms asked us to fill out.
 - We've conferred with Alex Killoch and Paul Duffy for OTTP, Roger Smithies from ERD on OPSEU, and William Bromm on SCOPA.
 - Comms wants to be able to speak to this/be able to provide to Kyle should it come up in their briefing for DM Betzner tomorrow (the materials for which are attached that they sent earlier). Will be sending this to them as draft tonight.
- 2) Proposed AG Engagement after the Pension Panel on Friday
 - This has a decision point for DMO. If the DM is going to be the one to speak with the AG, a call needs to be set up and draft messaging is proposed in the attached.

Once you are in agreement, I'll share these with Dane.

Thanks
Sarah

PAEAP Report_Stakeholder Engagement Plan_v1.pdf

PAEAP Report Stakeholder Engagement Plan - DRAFT

Tactic	Target Audience	Purpose	Lead	Timing
Internal				
Phone Call	OFA	Alert the stakeholder when the report is being released. OFA previously attended the Minister's Briefing on January 17 th	OPCD	Feb 9
Phone Call	EDU	Alert the stakeholder when the report is being released.	OPCD	Feb 9
Chair and/or Panel briefing	SCOPA	Provide a briefing to SCOPA on the report's recommendations. SCOPA members typically select the matters they wish to discuss at the Committee. To offer a briefing, options include: - DM or Minister could write to the Chair of SCOPA; - TBS MO could reach out to House Leader's Office; or - Wait for the committee to call the Ministry for a briefing.	DM or MO	TBD
External				
Panel briefing	Auditor General	Provide the AG an opportunity to discuss the report's recommendations with the Panel. The Chair provided an embargoed copy of the report to the Auditor General on January 26. The Panel will meet with the AG on February 3rd.	Panel	Report – January 26 Briefing – February 3
DM Phone Call (Recommended Approach – TBC)	Auditor General	Relay government intention to adopt recommendations of the Panel for OTPP and OPSEU, and timing considerations for the release.	TBS/MOF	February 3 – following Panel's meeting
EDU - ADM Phone Call	OTF and Teachers' Pension Plan	Alert the stakeholders that report is being released.	EDU via Ross Peebles	Tentative – February 10
DM phone call (Recommended Approach)	OPSEU	Alert the stakeholder that report is being released.	TBS DM	Tentative – February 10

PAEAP - Comms Material for DM Briefing.pdf

From: Sullivan, Bryant (TBS) []
To: MacIntyre, Kyle (TBS) [Kyle.MacIntyre@ontario.ca]
CC: Hosick, Sarah (TBS) [Sarah.Hosick@ontario.ca]; Laughton, Patrick (TBS) [Patrick.Laughton@ontario.ca]; Miller, Amanda (TBS) [Amanda.Miller@ontario.ca]
Subject: PAEAP - Comms Material for DM Briefing
Date: Tuesday, January 31, 2017 16:40:25
Attachment 1: PAEAP_Comms_V2_20170131.pptx
Attachment 2: PAEAP Report_Release Recommendation_v15_20170131.docx
Attachment 3: PAEAP Report_Rollout + Production Calendar_V9_20170131.docx
Attachment 4: image001.jpg

Hi Kyle,

FYI here are the three products we'll be bringing to support tomorrow's comms discussion with DM Betzner:

- Briefing deck
- Release recommendations
- Production calendar

These are all more or less based on previous iterations of materials that have been circulating.

I'll be sharing these with CO and MOF comms at 4:30 so they're tee'd up in advance.

We'll bring hard copies tomorrow too.

Thanks

Bryant

Bryant Sullivan, APR

Assistant Director, Corporate Communications

Treasury Board Secretariat

(o) 416-325-1378

(c) 647-330-5784

(e) Bryant.J.Sullivan@ontario.ca

http://intra.net.gov.on.ca/tbs/files/2014/07/TBS-logo_RGB_61-x-25px.jpg

Communications Branch

Your Strategic Partner

PAEAP Report_Release Recommendation_v15_20170131.pdf

Pension Asset Expert Advisory Panel Report
Release Recommendations

Communications Approach

- Comms approach must not jeopardize **independent and neutral nature of PAEAP**.
- Messaging should remain **neutral and factual**, balancing need for gov't to state its position, **while demonstrating respect for all parties involved**, i.e. Auditor General, PAEAP and independent standard setters.
- Communications plan, tactics and messaging to remain **flexible** and **adjustable** based on advice and coordination with Ministry of Finance (e.g. Q3 report, long-term fiscal report).
- Tactics and messaging will be **reassessed**, as needed, to respond to **Auditor General's position** (if known).
- Continue to position government as **cooperative and diligent** and acting with **integrity** in its attempt to resolve the issue, and ensure its financial statements support transparency and accountability.
- Continue to put forward **Minister Sandals and Minister Sousa** as primary spokespersons to deliver government's key messages (e.g. via press conference or availability).
- Continue to **engage QP Press Gallery, particularly print media**, in an effort to carry the gov'ts message to a broad spectrum of Ontarians.
- Provide **pre-briefings** led by PAEAP for opposition and media to better explain this complex topic. Consideration should be given to PAEAP briefing SCOPA.

Considerations:

- **Coordination with** partner ministries (MOF & OFA)
- **Outreach to:**
 - o **Stakeholders** (Auditor General, FAO, OTF, PSAB, SCOPA)
 - o **Pension plans** and their **related ministries** (OPSEUPP & TBS, OTPP & EDU, HOOPP & MOHLTC, CAAT & MAESD)
- **Availability of Ministers, AG and panel members:**
 - o Minister Sousa away Feb. 14-17
 - o AG away week of Jan. 23 & week of Feb. 6
 - o Murray Gold (lawyer) not available Feb. 2, available only by phone Feb. 13
 - o Uros Karadzic (actuary) not available Jan. 30 or Feb. 2
- **Logistical planning** around Feb. 13 **Caucus retreat**.
- If paper-only release (i.e. no pre-briefs or press conference with PAEAP), report could be ready for public release as early as **Thursday, Feb. 2**

Timeline for Monday, Feb. 13 Release

Date	Item	Lead	Status
Jan. 23	Final report submitted to TBS	PAEAP	COMPLETE
Jan. 25	Embargoed final report shared with MOF	TBS (OPCD)	COMPLETE
Jan. 26 (4pm)	Letter sent from PAEAP Chair to Auditor General, with embargoed final report and offer to brief	TBS (OPCD), PAEAP	COMPLETE
Feb. 3 (10:30am)	PAEAP Chair briefs Auditor General on report findings <i>NOTE: Reassess comms tactics to respond to Auditor General's position, if known</i>	PAEAP	PENDING
Feb. 3-10	Outreach to stakeholders, and pension plans and their related ministries with findings and recommendations	TBS, MOF	PENDING
Feb. 13	Public release of report (see announcement options below)	TBS (Comms & OPCD), MOF, PAEAP	PENDING

Considerations:

- Week of Feb. 6 – MOF releasing Long-term Fiscal Report (TBC)
- Feb. 13/17, or week of Feb. 21 – MOF releasing Q3 report (TBC)
- Feb. 20 – Family Day
- Feb. 21 – House resumes

Pension Asset Expert Advisory Panel Report
Release Recommendations

Announcement Options for Monday, Feb. 13 Release

Option 1 – Press conference:

- PAEAP Chair and members hold embargoed pre-briefings in Queen's Park media studio for opposition (9:30am), followed by media (10am).
- Following PAEAP pre-briefings, hold press conference with Ministers Sandals and Sousa (10:30am).
 - o Location to be determined (Queen's Park media studio vs. site near Caucus retreat).
 - o Timing of advisement of AG TBD
- TBS issues province-wide news release, linking to report on Ontario.ca.
- At a later date, TBS issues media bulletin on Newsroom with no email distribution to announce supplemental report (HOOPP & CAAT) available on Ontario.ca.

Option 2 – Paper release & media availability:

- TBS Newsroom postings would include:
 - o Province-wide news release, linking to report posted on Ontario.ca
 - o Statements by Ministers Sandals and Sousa
- PAEAP members, Minister Sandals and Minister Sousa available for comment on reactive basis.
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Option 3 – Bundle with release of MOF Q3 report:

- Joint release of MOF Q3 report & PAEAP report recommendations.
- PAEAP Chair and members hold embargoed pre-briefings in Queen's Park media studio for opposition, followed by media.
- Following PAEAP pre-briefings, press conference with Ministers Sandals and Sousa.
 - o Location to be determined (Queen's Park media studio vs. site near Caucus retreat).
- MOF issues province-wide news release on Q3, including information on PAEAP recommendations, and linking to report posted on Ontario.ca.

PAEAP Report_Rollout + Production Calendar_V9_20170131.pdf

Pension Asset Expert Advisory Panel Report Timeline – Confidential Advice to Cabinet

Tentative Release Date: February 13 Announcement Option 1 – Press Conference

January / February 2017

- Legend:**
- Rollout timing
 - Production schedule
 - Considerations
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SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
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12	13 TBC MOF Q3 report (Feb 13/17 or w/of Feb 21) Caucus Retreat Report Release Date (Tentative) Comms Rollout: • PAEAP opposition briefing (9:30am) • PAEAP media briefing (10am) • Ministers' press conference (10:30am – location TBC) • Report posted & provincewide NR (10:30am) • Murray Gold (lawyer) available by phone only	14 Minister Sousa unavailable	15 Supplemental report (HOOPP & CAAT) submitted to TBS (TBC)	16	17 TBC MOF Q3 report (Feb 13/17 or w/of Feb 21)	18
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image001.pdf

TBS

7A - Email - January 31 2017 - PAEAP - Comms Material for DM Briefing.pdf

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To: [MacIntyre, Kyle \(TBS\)](#)
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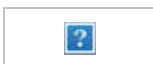
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