1 - Email - January 23 2017 - RE_ PAEAP Report_Release Recommendation_v5_20170123.pdf

From: DiMuzio, Sofie (TBS)
To: Veinot, Cindy (TBS)
Cc: Petsche, Nadine (TBS); Tam, Nelson (TBS); Hosick, Sarah (TBS); Sullivan, Bryant (TBS); Miller, Amanda (TBS); Jackson, Sarah (TBS); Ovenden, Erin (TBS)
Subject: RE: PAEAP Report_Release Recommendation_v5_20170123
Date: January-23-17 9:54:58 PM
Attachments: PAEAP Report_Release Recommendation_v5_20170123.docx

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Thanks for the helpful feedback Cindy – much appreciated

From: Veinot, Cindy (TBS)
Sent: January-23-17 8:54 PM
To: DiMuzio, Sofie (TBS)
Cc: Petsche, Nadine (TBS); Tam, Nelson (TBS); Hosick, Sarah (TBS)
Subject: PAEAP Report_Release Recommendation_v5_20170123

Hi Sofie – my comments on the recommendations – thanks,

Cindy

PAEAP Report_Release Recommendation_v5_201701.pdf

Pension Asset Expert Advisory Panel Report – Release Recommendation

Communications Approach

- A **proactive, low to medium profile** communications approach is recommended.
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Pension Asset Expert Advisory Panel Report –
Release Recommendation

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	Outreach to OPSEU, OTPPB with findings and recommendations	OPCD
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w/o February 13	**Public release of report**	**Comms/OPCD/PAEAP**
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Pension Asset Expert Advisory Panel Report –
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APPENDICES:

Target Audiences

Primary Audiences	Position	Tactic to Reach
FAO	Negative • The FAO has publicly stated the Province's plan to balance the budget relies on optimistic assumptions for revenue growth and program spending restraint. • The FAO believes there is significant risk the gov't may not be able to eliminate the deficit in 2017-18, nor maintain a balanced budget going forward. • Stephen LeClair, a Financial Accountability Officer, is quoted that the FAO will not give an opinion on the pension asset matter and that the FAO is only interested in how this affects Ontario's fiscal position. (TorStar, Oct 6, 2016)	• Letter from Deputy Minister with a link to report on Ontario.ca
Auditor General	Negative • QP Briefing (Nov 30) reports the AG is wondering if the government is trying to "undermine" her office in releasing unaudited financial statements.	• Letter from panel with embargoed copy of report • Panel briefing
PSAB, OPSEU, OTPPB, HOOPPB, CAATPPB	Neutral • TBS has not received correspondence on this issue. It is fair to assume that these stakeholders are waiting for Ontario to clarify their position on the matter.	• Letter from panel highlighting report's findings
Secondary Audiences	Position	Tactic to Reach
Credit rating agencies	Neutral • Checking with MOF for any recent inquiries, etc	• Letter from OFA head Gadi Mayman with link to report on Ontario.ca
Official opposition and third party	Negative • PC Finance Critic Vic Fedeli has talked about the govt's 'budget hole' and says the gov't is in "*full panic mode*" (Ottawa Sun Oct 4, Beach Mirror Oct. 3) • NDP Leader Andrea Horwath is quoted on her concern over the relationship between the government and the Auditor General, describing it as a "*pattern of behaviour*". (TorStar, TorSun)	• Opposition briefing
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Commented [CV7]: We also have to consider how we (public service) communicate with her, and should consider if the Ministers will want to have a conversation with her

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Pension Asset Expert Advisory Panel Report –
Release Recommendation

Issues & Mitigation

Issue/Consideration	Mitigation Strategy	Key Messages
Stakeholder uncertainty about Ontario's fiscal situation.	• Proactive outreach to key stakeholders (e.g. credit rating agencies, FAO) to deliver positive messaging on Ontario's financial position.	• Our intention is to move forward and continue to present the province's finances fairly and accurately. • We remain committed to balancing the Budget by 2017-18 and remaining balanced in 2018-19.
Perception that Ontario has paid for a third party opinion.	• Reactive messaging in Qs&As reinforcing independent nature of Panel of professional experts.	• Since the release of the Public Accounts, the government established an independent advisory panel. • The Pension Asset Expert Advisory Panel has provided their neutral advice on the interpretation of the accounting standards to Ontario's defined benefit pension plans.
Auditor General continues to disagree with Ontario's position on pension assets, given Panel's findings are not binding.	• Proactive outreach to Auditor General's Office by Panel to provide briefing and embargoed report. • Reactive messaging in Qs&As	• The government respects the oversight and recommendations provided by all independent officers of the Legislative Assembly of Ontario, including the Auditor General. • The Panel's advice will help inform discussions with the Auditor General as we work toward agreement on how the accounting standard is applied to future financial statements.
Address Recommendation #1 in **Auditor General's 2016 Report**: "We recommend that the TBS and the MOF finalize their position on the pension asset issue."	• Proactive outreach to Auditor General's Office by government to finalize position on pension asset issue. • Messaging in Qs&As. QUESTIONS TO BE DISCUSSED: 1. Do we keep qualified ~~rating~~opinion? If so, do we need more messaging that explains basis and what this means? 2. Do we do this as part of Report Release as part of 2016-17 public Accounts?	•
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10 - Email - January 31 2017 - FW_ Pension Panel report - OPSEU.pdf

From: Hosick, Sarah (TBS)
To: Veinot, Cindy (TBS); Petsche, Nadine (TBS); Tam, Nelson (TBS)
Subject: FW: Pension Panel report - OPSEU
Date: January-31-17 3:30:27 PM

Hi Cindy, Nadine, Nelson,

Roger, the manager at Bargaining and Compensation, just gave me a call to discuss stakeholder outreach in regards to OPSEU. He is concerned with any reach out other than from the Deputy, as the pension plan is jointly sponsored, and therefore each sponsor should be receiving all communication at the same time.

He said we have to very carefully navigate this relationship as clearly in this case the government has received the report ahead of OPSEU (even though the government commissioned the report on its own, and this is a courtesy reach out).

Therefore on our stakeholder table, **Nelson** can you please add that our recommended approach for OPSEU is for DM reach out to the OPSEU President due to being joint sponsors on the plan. Comms is looking for the table this evening (even if we have TBDs and "Recommended Approaches" within it for now)

Thanks
Sarah

From: Hosick, Sarah (TBS)
Sent: January-31-17 2:29 PM
To: Smithies, Roger (TBS)
Cc: Tam, Nelson (TBS)
Subject: Pension Panel report - OPSEU

Hi Roger,

We are currently preparing for the release of the Pension Asset Expert Advisory Panel Report (date tbd in the upcoming weeks).

As part of the planning, we are looking at stakeholder outreach prior to the report's release. (e.g., telephone call prior to release, and email on day of release with link to report).

OPSEU is one the stakeholders being considered. Alex Killoch has recommended that we reach out to you to discuss if reach out is required and if so, your branch being the one to give notice of the report to OPSEU, as reach out is typically done through their usual contacts.

For reference, notice to the other pension plan, OTPP, will be given through
EDU.

Are you available for a call this afternoon to discuss this possibility?

Thanks
Sarah

Sarah Hosick
Executive Assistant & Special Policy Advisor (A) | Office of the Provincial Controller Division
Office of the Treasury Board | Treasury Board Secretariat
7 Queen's Park Cres E, 2nd Floor, Toronto, ON, M7A 1Y7
416-212-8512

11 - Email - February 1 2017 - FW_ Panel - Stakeholder and AG Engagement Plans.pdf

From:	Hosick, Sarah (TBS)
To:	Veinot, Cindy (TBS); Petsche, Nadine (TBS); Tam, Nelson (TBS)
Cc:	Laughton, Patrick (TBS)
Subject:	FW: Panel - Stakeholder and AG Engagement Plans
Date:	February-01-17 4:45:05 PM

FYI – The DM will call the AG on Friday afternoon after the panel meeting.

From: Nelson, Dane (TBS)
Sent: February-01-17 4:34 PM
To: Hosick, Sarah (TBS)
Subject: FW: Panel - Stakeholder and AG Engagement Plans

See below.

Regards,

Dane Nelson, Senior Policy Advisor
Treasury Board Secretariat | Deputy Minister's Office
Phone: 416-325-3617 | Mobile: 416-409-3437 | E-mail: Dane.Nelson@ontario.ca

From: MacIntyre, Kyle (TBS)
Sent: February-01-17 4:31 PM
To: Nelson, Dane (TBS)
Cc: Simone, Nicole (TBS)
Subject: Re: Panel - Stakeholder and AG Engagement Plans

Helen will give a call in the afternoon on Friday

On Feb 1, 2017, at 4:27 PM, Nelson, Dane (TBS) <Dane.Nelson@ontario.ca> wrote:

> Hey Kyle,
>
> Would you be able to confirm?
>
> Regards,
>
> **Dane Nelson, Senior Policy Advisor**
> Treasury Board Secretariat | Deputy Minister's Office
> Phone: 416-325-3617 | Mobile: 416-409-3437 | E-mail: Dane.Nelson@ontario.ca
>
> **From:** Hosick, Sarah (TBS)
> **Sent:** February-01-17 3:11 PM
> **To:** Nelson, Dane (TBS)
> **Cc:** Laughton, Patrick (TBS)
> **Subject:** RE: Panel - Stakeholder and AG Engagement Plans
>
> Hi Dane,

Wondering if there was a decision or update on the outreach strategy to the AG after she meets with the Panel on Friday morning.

Since she will be away next week, it seems as if Friday afternoon is the only option if the DM is going to reach out.

Thanks
Sarah

From: Hosick, Sarah (TBS)
Sent: January-31-17 8:14 PM
To: Nelson, Dane (TBS)
Subject: Re: Panel - Stakeholder and AG Engagement Plans

Sorry should've said discussion singular. Comms is having a briefing with DM Betzner that they said Kyle usually attends.

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Nelson, Dane (TBS)
Sent: Tuesday, January 31, 2017 7:57 PM
To: Hosick, Sarah (TBS)
Cc: Laughton, Patrick (TBS)
Subject: Re: Panel - Stakeholder and AG Engagement Plans

Hey what discussions are you referring too?

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Hosick, Sarah (TBS)
Sent: Tuesday, January 31, 2017 7:36 PM
To: Nelson, Dane (TBS)
Cc: Laughton, Patrick (TBS)
Subject: Panel - Stakeholder and AG Engagement Plans

Hi Dane,

I've attached two documents to support the Panel discussions happening tomorrow:

1) Draft Stakeholder Engagement Plan that will be used as support for the Comms briefing with DM Betzner tomorrow that Kyle is attending
    - Flagging that we've recommended that it be DM outreach for the AG after the pension panel meets with her, as well as potential OPSEU reach out (based on discussions with ERD seems to be the best approach). This is draft and can be changed as discussions evolve.

2) Proposed Approach for the AG Engagement after the Pension Panel on Friday

- This has a decision point - if the DM is going to be the one to speak with the AG, a call needs to be set up with her office. Draft messaging is proposed in the attached (we can continue to work on this if this approach is decided).

Happy to discuss

Have a good evening,
Sarah

12 - Email - February 7 2017 - Fw_ PAEP Holding Messaging.pdf

From:	Hosick, Sarah (TBS)
To:	Petsche, Nadine (TBS); Tam, Nelson (TBS)
Subject:	Fw: PAEP Holding Messaging
Date:	February-07-17 8:21:57 AM
Attachments:	Mitigation Options #1 (current version) SD edits.docx
Importance:	High

FYI

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: DiMuzio, Sofie (TBS) <Sofie.DiMuzio@ontario.ca>
Sent: Monday, February 6, 2017 10:10 PM
To: Angus, Helen (TBS); Hughes, Karen (TBS); Veinot, Cindy (TBS)
Cc: MacIntyre, Kyle (TBS); Laughton, Patrick (TBS); Hosick, Sarah (TBS); Miller, Amanda (TBS); Sullivan, Bryant (TBS)
Subject: PAEP Holding Messaging

Hi everyone,

In the interest of time I am sharing the attached holding messaging for simultaneous review. The messaging is drafted based on a couple scenario variations for which we have proposed mitigation tactics - in the first we continue to track to Feb 13 release and in the second, we release the report, NR and statements the same day and have the panel and ministers available for media on a reactive basis.

Please let me know if you have any feedback and kindly note that the MO has requested to see this tonight.

Happy to chat if you have questions.

Sofie

Mitigation Options #1 (current version) SD ed.pdf

Pension Asset Expert Advisory Panel Report
Early Release Mitigation and Messaging

Scenario 1 story runs Feb 7– no extensive media pick up - holding messaging for reactive use only

Scenario 1 A story runs Feb 7– no extensive media pick up but stakeholder comments publicly

Mitigation Option	Key Messages	Considerations
Do not release report early: • Continue tracking for planned release date of Feb. 13	Scenario 1 • I can confirm that we have received the report from the Pension Asset Expert Advisory Panel. • We are in the process of analyzing its findings, and having discussions with key stakeholders, so it would be inappropriate for me to comment at this time. • It is unfortunate the report has been made public before the government could prepare it for public release. • The government has every intention of formally releasing the full report to the public as soon as possible. Scenario 1A **If stakeholder reaction is negative:** • We are disappointed that stakeholders are commenting on a report that has been made public before the government could properly prepare it for release. • As I said, I can confirm that we have received the Panel's final report. • We are in the process of analyzing its findings, and having discussions with key stakeholders, so it would be inappropriate for me to comment at this time. • The government has every intention of formally releasing the full report to the public as soon as possible.	Pros: • Allows time to plan for press conference and technical briefing, if desired Cons: • Delay presents opportunity for stakeholders/third parties to frame public narrative • Each day would present mounting pressure on gov't to comment
Scenario 2 - story runs Feb 7– extensive media pick up and negative stakeholder reaction/public comment		
Release report early: • Post online on Ontario.ca, along	• I can confirm that we have received the report from the Pension Asset Expert Advisory Panel. • It is unfortunate the report has been made public before the government could properly prepare it for public	Pros: • Government's position is known right away, filling the

Mitigation Option	Key Messages	Considerations
with a news release. • Ministers Sandals and Sousa, and Panel Chair made available for media questions on reactive basis.	release. • In the interest of transparency, we will make full report available to the public as soon as possible. • We are pleased that the Panel's advice aligns with Ontario's view that net pension assets should continue to be recognized in Ontario`s financial reports, as they have been for the past 14 years. • By applying the panel's advice to the Province's 2015-16 finances, Ontario's deficit has been lowered to $3.5B, from the $5B originally reported in the 2015-16 Public Accounts. • I would like to thank the expert advisory panel for their thorough analysis and recommendations on this complex accounting issue. • Ontario is accepting the panel's recommendations, which will inform the preparation of the Province's future financial statements. • The province remains committed to achieving a balanced budget by 2017-18, and remaining balanced in 2018-19. **If stakeholder reaction is negative:** • We are disappointed that [stakeholder X] disagrees with the recommendations of the panel. • Ultimately, the decision on how to apply public sector accounting standards to pension assets rests with the Treasury Board Secretariat and the Ministry of Finance, acting on behalf of the government. • We hope to have ongoing discussions with [stakeholder X] on how the accounting standard is applied to the Province's future financial statements.	vacuum of information quickly and allowing it to be part of the public narrative Cons: • Compressed timelines for product approvals (e.g. News Release)

12 - Mitigation Options #1 (current version) SD edits.docx

Pension Asset Expert Advisory Panel Report
Early Release Mitigation and Messaging

Scenario 1 story runs Feb 7– no extensive media pick up - holding messaging for reactive use only

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Mitigation Option	Key Messages	Considerations
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Pension Asset Expert Advisory Panel Report
Early Release Mitigation and Messaging

Mitigation Option	Key Messages	Considerations
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13 - Email - February 7 2017 - Fw_ Comms Update.pdf

From:	Veinot, Cindy (TBS)
To:	Tam, Nelson (TBS); Petsche, Nadine (TBS)
Cc:	Hosick, Sarah (TBS)
Subject:	Fw: Comms Update
Date:	February-07-17 9:53:54 PM
Importance:	High

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: DiMuzio, Sofie (TBS) <Sofie.DiMuzio@ontario.ca>
Sent: Tuesday, February 7, 2017 7:33 PM
To: Angus, Helen (TBS); Hughes, Karen (TBS); Veinot, Cindy (TBS)
Cc: MacIntyre, Kyle (TBS); Laughton, Patrick (TBS); Hosick, Sarah (TBS); Miller, Amanda (TBS)
Subject: Comms Update

Hi everyone,

Quick update to share on PEAP comms following some discussions that took place this evening…

- Confirmed we are tracking to Monday Feb 13 to release the report as originally planned
- Panel to hold press conference Monday @ 10:00
- No Minister avails or statements
- Opposition briefing to be offered up for Monday afternoon - (MO to coordinate)

Additional edits will be made to the NR and shared with us tomorrow – we will then put this through for final approval translation etc.
Folks are comfortable with the holding messaging we circulated yesterday and will be leveraging to address any media qs that arise between now and Monday.

In light of this latest direction, I have my team updating our comms rollout and will share with you tomorrow.

Happy to provide more details if you have any questions.

Sofie Di Muzio
Director (A), Communications Branch
Treasury Board Secretariat
Office: 416-325-1376
Mobile: 416-319-5606

2 - Email - January 24 2017 - RE_ Confidential_ PAEAP report release products.pdf

From:	DiMuzio, Sofie (TBS)
To:	Veinot, Cindy (TBS); Hughes, Karen (TBS)
Cc:	Laughton, Patrick (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject:	RE: Confidential: PAEAP report release products
Date:	January-24-17 9:18:30 PM

I don't see it being a problem but we'll check and confirm. Thanks

---

From: Veinot, Cindy (TBS)
Sent: January-24-17 9:15 PM
To: DiMuzio, Sofie (TBS); Hughes, Karen (TBS)
Cc: Laughton, Patrick (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: RE: Confidential: PAEAP report release products

I'm not sure Murray needs to be in Toronto, but I think Tricia would want him to be available on a conference call to answer any legal questions. Is that doable from a technical perspective? Sounds like he would be available in the mornings Toronto time, pending confirmation of specific dates for all.

From: DiMuzio, Sofie (TBS)
Sent: January-24-17 9:11 PM
To: Veinot, Cindy (TBS); Hughes, Karen (TBS)
Cc: Laughton, Patrick (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: RE: Confidential: PAEAP report release products

Thanks – we did get this info. So in case we are pushed – in a worst case scenario would the Chair be open to doing the press conference with just Uros or is she firm on having both Murray and Uros present??

From: Veinot, Cindy (TBS)
Sent: January-24-17 9:05 PM
To: DiMuzio, Sofie (TBS); Hughes, Karen (TBS)
Cc: Laughton, Patrick (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: RE: Confidential: PAEAP report release products

Thanks Sofie

Re: availability of the panel members, below is an excerpt from an email I received from the Chair yesterday.

Nelson may have updated information, so I have copied him on this as well.

"Not sure if you have been advised about panel member schedules. Paul is available only week of Feb 6. Murray is in Asia until after mid-Feb. He can participate by phone in morning meetings. Uros and I are fairly open and flexible."

From: DiMuzio, Sofie (TBS)
Sent: January-24-17 9:01 PM
To: Hughes, Karen (TBS); Veinot, Cindy (TBS)
Cc: Laughton, Patrick (TBS); Hosick, Sarah (TBS)
Subject: FW: Confidential: PAEAP report release products
Importance: High

Hi Karen and Cindy,

Sharing the attached updated comms rollout and calendar in case it hasn't been forwarded on via DMO yet. A third release date option of Feb 2 was added and we streamlined some of the considerations to support decision making. My team has been working with Nelson to fill a few information gaps with a few still remaining which I gather will be discussed at tomorrow's FPC meeting.

On a side note, one of the key considerations of our comms approach is panel member availability - we made this a consideration on the understanding that the Chair has indicated a strong preference to have both the lawyer(Murray) and the actuarial expert (Uri), at the media conference. I'm not sure how much of a condition this is but given it can become an issue under all three timeline options and the likelihood that it may come up at FPC, I am flagging in hopes we might be able to have a better sense from the Chair in advance of the meeting tomorrow.

Thoughts?

From: Jackson, Sarah (TBS)
Sent: January-24-17 6:59 PM
To: Nelson, Dane (TBS); Simone, Nicole (TBS); MacIntyre, Kyle (TBS)
Cc: DiMuzio, Sofie (TBS); Sullivan, Bryant (TBS)
Subject: Confidential: PAEAP report release products

Hi all,

Please find attached two products to support tomorrow's discussion on the PAEAP report:

- Updated release recommendation document (note – we understand tomorrow's conversation will focus on the first two pages of this document, but we have left the appendices on pages three and four for your reference)
- Report rollout and production calendar (this is a visual representation of the rollout timing options)

Thanks and let us know if you have any questions.

Sarah

Sarah Jackson

Senior Communications Consultant
Treasury Board Secretariat
Ph: 416-212-7790
Email: Sarah.Jackson@ontario.ca

3 - Email - January 30 2017 - Fw_ PAEAP Comms Status Update.pdf

From:	Hosick, Sarah (TBS)
To:	Tam, Nelson (TBS)
Subject:	Fw: PAEAP Comms Status Update
Date:	January-30-17 7:49:11 AM
Attachments:	PAEAP Report_Release Recommendation_v12_20170128 (current version).docx PAEAP Report_Rollout + Production Calendar_V5_20170128 (current version).docx

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Sullivan, Bryant (TBS) <Bryant.J.Sullivan@ontario.ca>
Sent: Sunday, January 29, 2017 4:59 PM
To: Hosick, Sarah (TBS); Laughton, Patrick (TBS)
Subject: FW: PAEAP Comms Status Update

Hi guys, sorry I should've copied you on this too.

Patrick, I haven't shared this with Karen.

Bryant

From: Sullivan, Bryant (TBS)
Sent: January-29-17 2:58 PM
To: MacIntyre, Kyle (TBS); Nelson, Dane (TBS); Simone, Nicole (TBS); Veinot, Cindy (TBS); Petsche, Nadine (TBS)
Cc: Miller, Amanda (TBS); Jackson, Sarah (TBS); Ovenden, Erin (TBS)
Subject: PAEAP Comms Status Update

Hi all, I wanted to provide you with a quick update on the status of communications planning as we head into this week.

Logistics:

- We received some further direction from MO on Friday re. the comms rollout.
- We're still tracking towards a Feb. 13 release. No decision has been made about a press conference, but we've been asked to prepare for two scenarios:
  - News conference – Panel holds embargoed pre-briefings (opposition followed by media) to present findings of report and answer media q's in Queen's Park Media Studio. Minister Sandals and Sousa would then hold a news conference to provide an official response to the report and next steps (either in the Media Studio or location close to the Caucus retreat)
  - No news conference – Report is posted online, statements from Minister Sandals and Sousa are released, panel and ministers are available for comment

- We've also added a third option following preliminary discussions with OPCD and MOF comms, which is to combine the announcement with the release of MOF's Q3 Report.

- We've updated our communications scenarios document and production calendar accordingly (attached for your reference). I'll also be sharing these two products with MO today.

Products:

- We've prepared drafts of a number of communications products.

- We'll share these products with OPCD tomorrow so we can start getting them through approvals:
    - News release
    - Statement for Minister Sandals
    - Media Qs&As
    - Holding messaging

Thanks, and let me know if you have any questions.

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

TBS
Communications Branch
Your Strategic Partner

PAEAP Report_Release Recommendation_v12_20170.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.
- 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).
- Communications tactics will be **adjustable and flexible** to give gov't the ability to accommodate PAEAP's findings.
- 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:**
  - **Stakeholders** (Auditor General, FAO, OTF, PSAB, SCOPA)
  - **Pension plans** and their **related ministries** (OPSEUPP & TBS, OTPP & EDU, HOOPP & MOHLTC, CAAT & MAESD)
- **Availability of** AG and panel members:
  - AG away week of Jan. 23 & week of Feb. 6
  - Murray Gold (lawyer) not available Feb. 2, available only by phone Feb. 13; 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 & OFA	TBS (OPCD)	**TBC**
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 *NOTE: Reassess comms tactics to respond to Auditor General's position, if known*	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*
- *Week of Feb. 13 – MOF releasing Q3 report*
- *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).
  - Location to be determined (Queen's Park media studio vs. site near Caucus retreat).
  - 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:
  - Province-wide news release, linking to report posted on Ontario.ca
  - Statements by Ministers Sandals and Sousa

- PAEAP members, Minister Sandals and Minister Sousa available for comment on reactive basis.

- 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 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.
  - 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_V5.pdf

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

Legend:

- Rollout timing
- Production schedule
- Considerations

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

January / February 2017

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
22 **JANUARY**	23 Final Report submitted to TBS Report sent to translation	24	25 Embargoed Final Report to MOF & OFA **AG unavailable (w/o of Jan 23)**	26 Letter from PAEAP Chair to AG with embargoed Final Report and offer to brief English HTML coding complete	27	28
29	30 **Uros Karadzic (actuary) not available**	31 Report back from translation (noon)	1 **FEBRUARY** SOC meeting with AG	2 Earliest possible release date **Murray Gold (lawyer) & Uros Karadzic (actuary) not available** French HTML coding complete	3 PAEAP Chair briefs AG (10:30am) Feb 3-10: Outreach to stakeholders, pension plans & related ministries	4
5	6	7	8 **MOF releasing long-term fiscal report (w/o Feb 6)** **AG unavailable (w/o of Feb 6)**	9	10	11
12	13 **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** **MOF releasing Q3 report (Feb 13-15 TBC)**	15 Supplemental report (HOOPP & CAAT) submitted to TBS (TBC)	16	17	18
19	20 Family Day Holiday	21 **House resumes**	22	23 Supplemental report (HOOPP & CAAT) ready for release	24	25

3 - PAEAP Report_Release Recommendation_v12_20170128 (current version).docx

Pension Asset Expert Advisory Panel Report
Release Recommendations

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- Communications tactics will be **adjustable and flexible** to give gov't the ability to accommodate PAEAP's findings.
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  - Timing of advisement of AG TBD

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- PAEAP members, Minister Sandals and Minister Sousa available for comment on reactive basis.

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- MOF issues province-wide news release on Q3, including information on PAEAP recommendations, and linking to report posted on Ontario.ca.

3 - PAEAP Report_Rollout + Production Calendar_V5_20170128 (current version).docx

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

Legend:

- Rollout timing
- Production schedule
- Considerations

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

January / February 2017

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4 - Email - January 31 2017 - Re_ Release of Pension Report -- Confidential.pdf

From:	Petsche, Nadine (TBS)
To:	Veinot, Cindy (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject:	Re: Release of Pension Report -- Confidential
Date:	January-31-17 8:02:46 AM
Attachments:	image001.png

Certainly, any public doc would not reflect that, but in reality we can anticipate that the AG will raise it with the DM and so I think we need to prepare the DM with a response. N

From: Veinot, Cindy (TBS)
Sent: Tuesday, January 31, 2017 7:48 AM
To: Petsche, Nadine (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: Re: Release of Pension Report -- Confidential

I would prefer that a public response of the AG not be able to include a statement that she asked us to complete our analysis months ago and she still has not received it.

Cindy

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Petsche, Nadine (TBS)
Sent: Monday, January 30, 2017 7:06 PM
To: Veinot, Cindy (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: RE: Release of Pension Report -- Confidential

Cindy,

With regards to the speaking points, the AG will likely ask questions about planned Public Accounts reporting (specifically w.r.t. restatement of prior year's results) and be interested in revised note disclosure.

I think it would be prudent not to rush our analysis on pensions until we've had a chance to address the HOOPP and CAATPP items as well and provide on a complete basis. Although the action summary references mid-February as timing for pension related items, it was established in expectation of the Panel's work being completed and communicated before now. I would suggest no sooner than the 3rd week of February. The AG will still have access to the Panel's report and communicated intention w.r.t PA reporting for purposes of her upcoming draft audit plan.

N

1. OPCD to provide update to OAGO on work performed on the issues discussed such as: year-end adjustment, agency elimination adjustment, cash reconciliation, use of funding valuations, and improved note disclosure	OPCD	Mid-February

From: Veinot, Cindy (TBS)
Sent: January-30-17 6:22 PM
To: Petsche, Nadine (TBS); Hosick, Sarah (TBS); Tam, Nelson (TBS)
Subject: Release of Pension Report -- Confidential

Hi all,

I'm working with TBS Coms on timing and content of a discussion with the AG after she meets with the Panel. Please take a read through and let me know if anything is inconsistent with your understanding. The plan is to send this to Karen and then to DMO tomorrow.

Nadine – can we get the updated accounting analysis to the AG's office by the end of next week? See the last bullet.

Thanks,

****

The Panel is meeting with the Auditor General to review their report on February 3rd at 10:30. We believe that the Auditor General is away next week on vacation, therefore, her first day back (February 13) is the anticipated release date of the report (and the related press conference if that option is pursued). We believe it would be appropriate to provide the Auditor General with an update from the government this coming Friday (February 3rd) after her meeting with the Panel on both (a) the government's plans with respect to following the recommendations of the Panel, and (b) timing re: plans to release the report publicly.

Decisions:

- Who will speak with the Auditor General on February 3rd after her meeting with the Panel? (once this decision is made, time should be confirmed with the AG's office)
  - DM Angus
  - Minter Sandals
  -

Other

- What is the content of the discussion:
    - We understand the Panel has had an opportunity to review their report with you this morning.
    - The Province intends to adopt the recommendations of the Panel in accounting for both the Ontario Teacher's Pension Plan (OTPP) and the Ontario Public Service Employees' Union Pension Plan (OPSEUPP)[and the Province intends to communicate its plans with respect to the Panel's report on the date we release the Report.]
    - [In order to communicate the impact of the recommendations of the Panel on the 2016-17 year, the Province intends to release a Q3 update and reflect the impact of the Panel's recommendations in the Q3 update. In addition, the Province will reflect the impact on the historical financial information released in the Q3 report to the extent it is impacted by the Panel's recommendations (e.g. debt-to-GDP ratio)]
    - The planned release date for both the Panel's Report and the Q3 update is Monday, February 13, 2017 (to determine how much detail to provide – e.g. press conference, etc.)
    - The government also asked the Panel to look at the accounting for Healthcare of Ontario Pension Plan (HOOPP) and Colleges of Applied Arts and Technology Pension Plan (CAATPP). While these plans have not had net pension assets historically, they may in the future, and the governance structures from these plans differ from OTPP and OPSEUPP, and therefore warrant a separate analysis. The Panel will issue a supplement to their report once they have completed their work on these plans.
    - OPCD is in the process of updating their accounting analysis on OTPP and OPSEUPP based on the recommendations of the Panel and will forward that analysis to your staff by [February xx, 2017]

Cindy Veinot
Provincial Controller and Assistant Deputy Minister, Office of the Provincial Controller
Treasury Board Secretariat
Frost Building South
7 Queen's Park Crescent East
Toronto, Ontario M7A 1Y7

T: 416-325-8017
E: cindy.veinot@ontario.ca

TBS

image001.pdf

TBS

5 - Email - January 31 2017 - Re_ Pension Asset Expert Advisory Panel Update - Outreach Advice.pdf

From:	Hosick, Sarah (TBS)
To:	Sullivan, Bryant (TBS); Petsche, Nadine (TBS)
Cc:	Veinot, Cindy (TBS); Tam, Nelson (TBS)
Subject:	Re: Pension Asset Expert Advisory Panel Update - Outreach Advice
Date:	January-31-17 8:19:48 AM

Thanks Bryant, a template would be appreciated.

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Sullivan, Bryant (TBS)
Sent: Tuesday, January 31, 2017 6:25 AM
To: Petsche, Nadine (TBS)
Cc: Hosick, Sarah (TBS); Veinot, Cindy (TBS)
Subject: Re: Pension Asset Expert Advisory Panel Update - Outreach Advice

Thanks Nadine.

Cindy/Sarah, I think we need to map out the stakeholder outreach piece ASAP today or tomorrow (who reaches out to whom, how (phone call?) and in what order), in case we need to move quickly.

Would it help if my team flipped yours a quick template to help map it out?

Bryant

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Petsche, Nadine (TBS)
Sent: Monday, January 30, 2017 7:24 PM
To: Sullivan, Bryant (TBS)
Cc: Hosick, Sarah (TBS); Veinot, Cindy (TBS)
Subject: RE: Pension Asset Expert Advisory Panel Update - Outreach Advice

Hi Bryant.
I understand. I'm copying Cindy and Sarah on this note. I'm sure we'll be able to work something out. Stay tuned☺
Nadine

From: Sullivan, Bryant (TBS)
Sent: January-30-17 5:17 PM
To: Petsche, Nadine (TBS)
Subject: FW: Pension Asset Expert Advisory Panel Update - Outreach Advice

Hi Nadine, can someone from your shop step in and help to coordinate the stakeholder outreach piece? It's not normally something we handle directly – usually done by program folks. Particularly on this file I'm not entirely comfortable with my folks continuing along this path of looping in program folks since we have no knowledge of who knows what, or what's appropriate.

Let me know.
Thanks
Bryant

From: Killoch, Alex (MOF)
Sent: January-30-17 4:40 PM
To: Ovenden, Erin (TBS)
Cc: Jackson, Sarah (TBS); Sullivan, Bryant (TBS); Petsche, Nadine (TBS)
Subject: RE: Pension Asset Expert Advisory Panel Update - Outreach Advice

I expect it would have been through Total Compensation Branch at Treasury Board. Perhaps Roger Smithies, the manager in the branch, can help.

Alex

From: Ovenden, Erin (TBS)
Sent: Monday, January 30, 2017 4:37 PM
To: Killoch, Alex (MOF)
Cc: Jackson, Sarah (TBS); Sullivan, Bryant (TBS); Petsche, Nadine (TBS)
Subject: RE: Pension Asset Expert Advisory Panel Update - Outreach Advice

Hi Alex-

Thanks for this, definitely helpful. I'll follow up with Josh Paul for OTPP.

For OPSEU, I've heard that there was outreach to OPSEU in October or November (i.e. when the panel was announced or when Public Accounts was released). Is there any chance you can point me to someone who would remember how this outreach was accomplished?

Erin Ovenden
Senior Communications Consultant
Communications Branch | Treasury Board Secretariat
77 Wellesley Street West, Ferguson Block
Toronto, ON   M7A 1N3
Tel: 416-326-7727

From: Killoch, Alex (MOF)
Sent: January-30-17 4:17 PM
To: Ovenden, Erin (TBS)
Cc: Jackson, Sarah (TBS); Sullivan, Bryant (TBS); Petsche, Nadine (TBS)
Subject: RE: Pension Asset Expert Advisory Panel Update - Outreach Advice

Hi Erin

Notice to the Ontario Teachers Federation, as sponsor of the Teachers' Pension Plan would be through the Ministry of Education. I expect they would appreciate the opportunity to notify the plan and co-sponsor.

Josh Paul is the director responsible for the plan. Edu has an external person, Ross Peebles, who is the liaison with the OTF who would likely inform both the plan and the OTF.

On the OPSEU plan, there is no comparable person. I don't know that the sponsors have been as involved in the issue, as it is a relatively small impact.

Does that help?

Alex

From: Ovenden, Erin (TBS)
Sent: Monday, January 30, 2017 3:35 PM
To: Killoch, Alex (MOF)
Cc: Jackson, Sarah (TBS); Sullivan, Bryant (TBS); Petsche, Nadine (TBS)
Subject: Pension Asset Expert Advisory Panel Update - Outreach Advice

Hi Alex-

My name is Erin and I'm in the Communications Branch at TBS. We're working on a plan for the upcoming release of the Pension Asset Expert Advisory Panel's report on pension assets related to OPSEUPP and OTPP. I understand you might have some insights and advice on the best way to give the pension plans and co-sponsors a heads up. Any chance you help us? This is time sensitive as we're trying to get this info in advance of a briefing this Wednesday.

Please let me know and thank you in advance.

Erin Ovenden
Senior Communications Consultant
Communications Branch | Treasury Board Secretariat
77 Wellesley Street West, Ferguson Block
Toronto, ON M7A 1N3
Tel: 416-326-7727

6 - Email - January 31 2017 - ATTACHMENT RESEND_ PAEAP - Stakeholder Outreach.pdf

From: Ovenden, Erin (TBS)
To: Hosick, Sarah (TBS)
Cc: Sullivan, Bryant (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach
Date: January-31-17 11:50:11 AM
Attachments: FW SCOPA Question.msg
PAEAP Report_Stakeholder Engagement Plan_v1_20170130.docx

Hi Sarah-

Apologies, I have gremlins in my computer. Here's the correct attachment.

****
I've pulled together the attached template for stakeholder outreach on the PAEAP Report.

We advise that any outreach prior to the report's release (Feb 13 TBC) be via telephone, followed by a memo or email on the day of release. This follow-up email or memo could have a link to the report online and the news release.

As part of our Comms planning, we'd sketched out some of the stakeholders and done some research into leads and tactics. Here's what we cobbled together, which should give you a head start:

- OTPP:
  - Notice to the Ontario Teachers Federation, as sponsor of the Teachers' Pension Plan would be through the Ministry of Education.
  - Josh Paul is the director responsible for the plan. Edu has an external person, Ross Peebles, who is the liaison with the OTF who would likely inform both the plan and the OTF. Lead contact is at EDU
- OPSEU:
  - Alex Killoch at MOF suggested Total Compensation Branch at Treasury Board could help. The manager is Roger Smithies
- SCOPA:
  - See attached email from William Bromm (FW: SCOPA Question)
- PSAB:
  - Recommend PAEAP lead this outreach
- Auditor General:
  - Comms is suggesting DM phone AG's office after the Chair briefs AG on Friday. If you agree, please flag this approach with DMO.
- OFA, Credit Rating Agencies, etc:
  - Perhaps MOF can help?

I hope this is helpful. Please feel free to contact me if you have any questions.

Erin Ovenden
Senior Communications Consultant
Communications Branch | Treasury Board Secretariat
77 Wellesley Street West, Ferguson Block

Toronto, ON   M7A 1N3
Tel: 416-326-7727

FW_ SCOPA Question.pdf

From: Sullivan, Bryant (TBS) []
To: Ovenden, Erin (TBS) [Erin.Ovenden@ontario.ca]; Jackson, Sarah (TBS) [Sarah.Jackson@ontario.ca]; Miller, Amanda (TBS) [Amanda.Miller@ontario.ca]
Subject: FW: SCOPA Question
Date: Tuesday, January 31, 2017 11:29:31
Attachment 1: image001.png

See below from last night:

From: Veinot, Cindy (TBS)
Sent: January-30-17 6:23 PM
To: Sullivan, Bryant (TBS)
Cc: Hosick, Sarah (TBS)
Subject: FW: SCOPA Question

Bryant == see below – we've sent to Karen's office and will have a discussion on this as soon as we can.

Cindy

From: Bromm, William (CAB)
Sent: January-30-17 6:03 PM
To: Veinot, Cindy (TBS)
Cc: Hosick, Sarah (TBS)
Subject: RE: SCOPA Question

I am always happy to talk about SCOPA.

Before I talk about options, there is a general process issue I would raise.

Normally SCOPA members select the matters they wish to discuss at the Committee. For example, the pension asset question came up in the fall when the AG Report was first before the Committee and the members invited the Deputies to discuss Chapter 2 of the report.

Since that time, the Committee has moved on the consider other discreet chapters of the report. They are currently looking at a chapter on Energy I believe.

So one might need to consider the context in which the briefing would be offered/accepted. It would look odd for example for it to come up in the middle of their considerations on energy.

However, ultimately it is up to the Committee to decide what areas of the AG report they wish to consider further and what issues/information to examine as part of their consideration.

Against that background, there are a few options:

· The Deputy or the Minister could write to the Chair of the Committee and offer the briefing. The context would perhaps be the questions raised by certain Committee members when the pension asset treatment was discussed in Oct 2016 (when SCOPA was discussing chapter 2 of the report). It would be easy enough to get the transcript and make the connection. The Chair would then bring the letter to the attention of the Committee, and they would decide whether they wish to accept the briefing. If they accept, the Clerk would schedule it through the Ministry.

· Your MO could talk to the House Leader's Office about the potential for a briefing. The House Leader's Office could then discuss the idea with government members of the Committee, one of whom could move a motion at the Committee to invite the Ministry in for the briefing. If the motion is passed, the briefing would be scheduled by the Committee Clerk.

· Wait for the issue to become public again (for example, when the panel report is released) and see if the Committee takes up the matter on its own initiative. They would call the Ministry (and/or the panel Chair), and that would provide the context to give an overview of the report and then answer questions. I am not sure this is what you are looking for since you would essentially be waiting for the Committee itself to initiate the process, which might not happen. But consider also if the Committee does not initiate, how much do they want it?

Happy to chat.

W

From: Veinot, Cindy (TBS)
Sent: January-30-17 3:45 PM
To: Bromm, William (CAB)
Cc: Hosick, Sarah (TBS)
Subject: SCOPA Question

Hi William,

I have another question on SCOPA – if these aren't appropriate questions for you, send me in another direction -- since you've responded to my questions on SCOPA in the past, you have become my go-to person on this topic.

There has been a suggestion that we offer a briefing on the pension panel report to SCOPA – by the Chair and potentially the other members. My question is how we would make that offer. Would our Minister's Office write a letter to clerk of SCOPA offering the briefing?

Also – just an fyi that the Chair of the Pension Panel sent the pension report to the Auditor General last Thursday and the Panel is scheduled to meet with the Auditor General this coming Friday at 10:30 am. I believe that Steve mentioned he was meeting with the AG on February 1, so I just wanted to ensure he knew the status of the Panel.

Thanks,

Cindy Veinot

Provincial Controller and Assistant Deputy Minister, Office of the Provincial Controller

Treasury Board Secretariat

Frost Building South

7 Queen's Park Crescent East

Toronto, Ontario M7A 1Y7

T: 416-325-8017

E: cindy.veinot@ontario.ca

Description: cid:image001.png@01D20DD0.23D9CA40

image001.pdf

TBS

PAEAP Report_Stakeholder Engagement Plan_v1_2.pdf

PAEAP Report Stakeholder Engagement Plan

Tactic	Target Audience	Purpose	Lead	Timing
Internal (OPS)				
i.e. DM phone call, ADM phone call, DM memo, ADM memo	i.e. OFA, SCOPA, MOF, etc	i.e. provide head's up of release, share embargoed copy of report, offer briefing, alert that report is released, etc	i.e. OPCD, DMO, EDU, MOF, PAEAP etc	DATE
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6 - FW_ SCOPA Question.pdf

From:	Sullivan, Bryant (TBS)
To:	Ovenden, Erin (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS)
Subject:	FW: SCOPA Question
Date:	January-31-17 10:29:32 AM
Attachments:	image001.png

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Cc: Hosick, Sarah (TBS)
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Thanks,

Cindy Veinot
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Treasury Board Secretariat
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Toronto, Ontario M7A 1Y7

T: 416-325-8017
E: cindy.veinot@ontario.ca

image001_1.pdf

TBS

6 - PAEAP Report_Stakeholder Engagement Plan_v1_20170130.docx

PAEAP Report Stakeholder Engagement Plan

Tactic	Target Audience	Purpose	Lead	Timing
Internal (OPS)				
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7 - Email - January 31 2017 - RE_ ATTACHMENT RESEND_ PAEAP - Stakeholder Outreach.pdf

From: Tam, Nelson (TBS)
To: Hosick, Sarah (TBS) (Sarah.Hosick@ontario.ca)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach
Date: January-31-17 4:07:00 PM
Attachments: PAEAP Report_Stakeholder Engagement Plan_v1_20170130.docx

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Sarah

Attached is my update. The Internal Stakeholders are basically TBD as I don't have any final direction.

I will be leaving in about 15 minutes.

Thanks

Nelson
X20514

From: Ovenden, Erin (TBS)
Sent: January-31-17 11:50 AM
To: Hosick, Sarah (TBS)
Cc: Sullivan, Bryant (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

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  - Recommend PAEAP lead this outreach
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  - Comms is suggesting DM phone AG's office after the Chair briefs AG on Friday. If you agree, please flag this approach with DMO.
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I hope this is helpful. Please feel free to contact me if you have any questions.

Erin Ovenden
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77 Wellesley Street West, Ferguson Block
Toronto, ON M7A 1N3
Tel: 416-326-7727

PAEAP Report_Stakeholder Engagement Plan_v1_2_1.pdf

PAEAP Report Stakeholder Engagement Plan

Tactic	Target Audience	Purpose	Lead	Timing
Internal (OPS)				
TBD	OFA	Alert the stakeholders that report is being released. (Note – ADM was at briefings)	TBS/MOF	TBD
TBD	EDU	TBD	TBD	TBD
TBD	SCOPA	TBD	TBD	TBD
External				
Panel meet with Auditor General	Auditor General	Embargoed copy of the report provided to the Auditor General in advance of briefing.	Panel	Report – January 26 Briefing – February 3
DM to call	Auditor General	Ministry to reach-out to Auditor General after Panel Briefing.	TBS/MOF	February 3
ADM to contact EDU to advise Ross Peebles to call	OTF and Teachers' Pension Plan	Alert the stakeholders that report is being released.	EDU via Ross Peebles	Tentative – February 10
DM phone call	OPSEU	Alert the stakeholder that report is being released.	TBS DM	Tentative – February 10
Chair to contact Board	Public Sector Accounting Board	Alert the stakeholders that report is being released and recommendations in the report	Panel Chair	TBD

7 - PAEAP Report_Stakeholder Engagement Plan_v1_20170130.docx

PAEAP Report Stakeholder Engagement Plan

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TBD	OFA	Alert the stakeholders that report is being released. (Note – ADM was at briefings)	TBS/MOF	TBD
TBD	EDU	TBD	TBD	TBD
TBD	SCOPA	TBD	TBD	TBD
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DM phone call	OPSEU	Alert the stakeholder that report is being released.	TBS DM	Tentative – February 10
Chair to contact Board	Public Sector Accounting Board	Alert the stakeholders that report is being released and recommendations in the report	Panel Chair	TBD

8 - Email - February 1 2017 - Re_ ATTACHMENT RESEND_ PAEAP - Stakeholder Outreach.pdf

From: Ovenden, Erin (TBS)
To: Sullivan, Bryant (TBS); Hosick, Sarah (TBS)
Cc: Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: Re: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach
Date: February-01-17 8:11:19 AM

Also credit rating agencies. Finance could be the lead.

Thanks Sarah

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Sullivan, Bryant (TBS)
Sent: Tuesday, January 31, 2017 7:57 PM
To: Hosick, Sarah (TBS); Ovenden, Erin (TBS)
Cc: Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

Thanks Sarah, this is a great starting point.

Do you also need to consider outreach to the FAO and PSAB, plus HOOPP/MOHLTC and CAAT/MAESD?

From: Hosick, Sarah (TBS)
Sent: January-31-17 7:19 PM
To: Ovenden, Erin (TBS)
Cc: Sullivan, Bryant (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

Hi Erin,

Attached a draft stakeholder plan. Some of the approaches are still to be confirmed, but we've identified our recommended approach on them.

Thanks
Sarah

From: Ovenden, Erin (TBS)
Sent: January-31-17 11:50 AM
To: Hosick, Sarah (TBS)
Cc: Sullivan, Bryant (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
Subject: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

Hi Sarah-

Apologies, I have gremlins in my computer. Here's the correct attachment.

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I’ve pulled together the attached template for stakeholder outreach on the PAEAP Report.

We advise that any outreach prior to the report’s release (Feb 13 TBC) be via telephone, followed by a memo or email on the day of release. This follow-up email or memo could have a link to the report online and the news release.

As part of our Comms planning, we’d sketched out some of the stakeholders and done some research into leads and tactics. Here’s what we cobbled together, which should give you a head start:

- OTPP:
  - Notice to the Ontario Teachers Federation, as sponsor of the Teachers’ Pension Plan would be through the Ministry of Education.
  - Josh Paul is the director responsible for the plan. Edu has an external person, Ross Peebles, who is the liaison with the OTF who would likely inform both the plan and the OTF. Lead contact is at EDU
- OPSEU:
  - Alex Killoch at MOF suggested Total Compensation Branch at Treasury Board could help. The manager is Roger Smithies
- SCOPA:
  - See attached email from William Bromm (FW: SCOPA Question)
- PSAB:
  - Recommend PAEAP lead this outreach
- Auditor General:
  - Comms is suggesting DM phone AG’s office after the Chair briefs AG on Friday. If you agree, please flag this approach with DMO.
- OFA, Credit Rating Agencies, etc:
  - Perhaps MOF can help?

I hope this is helpful. Please feel free to contact me if you have any questions.

Erin Ovenden
Senior Communications Consultant
Communications Branch | Treasury Board Secretariat
77 Wellesley Street West, Ferguson Block
Toronto, ON M7A 1N3
Tel: 416-326-7727

8 - PAEAP Report_Stakeholder Engagement Plan_v1.docx

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 17th	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
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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

9 - Email - February 1 2017 - RE_ ATTACHMENT RESEND_ PAEAP - Stakeholder Outreach.pdf

From: Hosick, Sarah (TBS)
To: Tam, Nelson (TBS)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach
Date: February-01-17 3:52:09 PM

Thanks Nelson!

From: Tam, Nelson (TBS)
Sent: February-01-17 3:48 PM
To: Hosick, Sarah (TBS)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

Sarah

Attached is the update version of the engagement plan. I adjusted the OFA first column as my thought was that OFA ADM was to be notified to reach out to OFA directly which is changed to OPCD.

The meetings today regarding HOOPP and CAATPP are not related to this so I don't have to wait until later this afternoon.

Thanks

Nelson
X20514

From: Hosick, Sarah (TBS)
Sent: February-01-17 8:21 AM
To: Tam, Nelson (TBS)
Subject: Fw: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

My bad for taking off PSAB, as I thought during our meeting it was decided we wouldn't reach out.

Can you update based on Nadine and Comms comments?

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Petsche, Nadine (TBS) <Nadine.Petsche@ontario.ca>
Sent: Tuesday, January 31, 2017 8:51 PM
To: Hosick, Sarah (TBS)
Subject: RE: ATTACHMENT RESEND: PAEAP - Stakeholder Outreach

Sarah,
A couple of additional points for considerations/completeness. n

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From: Hosick, Sarah (TBS)
Sent: January-31-17 7:19 PM

To: Ovenden, Erin (TBS)
Cc: Sullivan, Bryant (TBS); Jackson, Sarah (TBS); Miller, Amanda (TBS); Tam, Nelson (TBS); Petsche, Nadine (TBS); Veinot, Cindy (TBS)
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Erin Ovenden
Senior Communications Consultant
Communications Branch | Treasury Board Secretariat
77 Wellesley Street West, Ferguson Block
Toronto, ON M7A 1N3
Tel: 416-326-7727

9 - PAEAP Report_Stakeholder Engagement Plan_V2.docx

PAEAP Report Stakeholder Engagement Plan - DRAFT

Tactic	Target Audience	Purpose	Lead	Timing
Internal				
Phone Call	OFA - Bonnie Lemcke	Alert the stakeholder when the report is being released.	OPCD	Feb 9
Phone Call	Credit Rating Agencies	Alert the stakeholder when the report is being released.	OFA	Feb 9
Phone Call	EDU	Alert the stakeholder when the report is being released.	OPCD	Feb 9
Phone call	ERB	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
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ADM – Office of the Budget Phone Call	FAO	Alert the stakeholders that report is being released. OFA to be advised when call is made.	ADM – Office of the Budget	February 10
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	OPSEU	Alert the stakeholder that report is being released.	TBS DM	Tentative – February

Tactic	Target Audience	Purpose	Lead	Timing
Approach)				10
Chair to contact Board	Public Sector Accounting Board	Alert the stakeholders that report is being released and recommendations in the report	Panel Chair	TBD

9 - PAEAP Report_Stakeholder Engagement Plan_v1np.docx

PAEAP Report Stakeholder Engagement Plan - DRAFT

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		Internal		
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DM phone call (Recommended Approach)	OPSEU	Alert the stakeholder that report is being released.	TBS DM	Tentative – February 10
TBD	PSAB	Suggest we include this as consideration should be given to whether it would be appropriate for the Chair to discuss with PSAB unless as an extension to the TOR requesting suggestions as input to the EFB Task Force.	Chair/ Provincial Controller	Before or after release