

EXTERNAL COMMUNICATIONS PLAN	
MINISTRY: Ministry of Revenue	MINISTER: The Honorable Monique Smith
COMMISSIONED BY: Angela Longo	PREPARED FOR: Boni Fox Gray
COPIED FOR: Michelle Wyton	PREPARED BY: Anna V. Wong
PROPOSED ROLLOUT: December 1, 2007	DATE PREPARED: October 31, 2007

CONTEXT

- The Ministry was established in 2006 when it became independent from being part of the former Ministry of Finance and Revenue. This needs a higher level of public awareness.
- We have a new minister. This also requires a higher level of public awareness.
- The Ministry is implementing a few changes – transferring corporate tax administration to CRA at the federal level and modernizing the tax filing process using the ONT-TAXS project. These initiatives need to reach a higher level of public awareness and obtain public buy-in in order for them to act accordingly.
- There are a few communications divisions within the Ministry working on specific focuses. All these division share common goals in their external communications strategies. There are also other government agencies doing stakeholder outreach that have similar audiences as we do. The planning and efforts that go into these strategies can be collaborated and harmonized for higher efficiency and effectiveness.

OBJECTIVES

- Raise public awareness of our Ministry and our work
- Obtain public understanding of and buy-in for the initiatives we are rolling out for them
- Align all communications projects and promote collaboration among all communications units within MOR (Revenue Communications, MOST, CTAR, OTAC, TASB, RMBD)
- Share communications opportunities with related government agencies (Canada Revenue Agency, Ministry of Finance, Ministry of Small Business and Entrepreneurship, Ministry of Economic Development and Trade)

KEY MESSAGES

- What the Ministry does: tax administration, education, investigation and reinforcement
- How our work relates to their business and lives – the taxes we collect from them, the way we process them and how the taxes contribute to Ontario’s expenses
- What new initiatives the Ministry is undertaking to improve user experience: CTAR, ONT-TAXS, committees, stakeholder outreach
- How to communicate with us – various committee survey groups and ServiceOntario
- One outreach contact point for the public and all agencies – Revenue Communications

ENVIRONMENTAL SCAN

Strengths

- MOR has new and improved tax filing processes for the convenience of all tax filers.
- Across the different ministries and communications units, we have a comprehensive pool of knowledge and expertise, as well as contact base and business intelligence which can be shared for collaborated and consistent communications efforts.

Weaknesses

- On the intergovernmental information sharing front, change management may meet with resistance.
- On the intergovernmental information sharing front, collaboration involves a wide scope of departments - organizational cultural adjustments may be required.
- On the intergovernmental information sharing front, information sharing is currently very scarce and centralized collection, storage, maintenance and access requires time, technical resources and human talents.

Opportunities

- MOR can promote its branding and new initiatives.
- MOR can collect input and establish newer and stronger relationships.
- MOR can harmonize, collaborate and streamline all the communication activities and the efforts and resources that go into them across different units by sharing information and opportunities.
- MOR can share outreach opportunities and channels of other government agencies.

Threats

- On the intergovernmental information sharing front, change management may meet with resistance.
- On the intergovernmental information sharing front, consistent and regular communication is required among management teams of involved groups to ensure collaboration and information sharing.
- On the public front, elections period means communication blackout – need to maintain relationships and monitor opportunities but turn down immediate speaking opportunities.

AUDIENCES

- The ultimate external stakeholder database will include information on the following groups from the data collected from Revenue Communications, MOST, CTAR, RMBD, TASB, OTAC and other government partners we will be working with.
 - o professional, business, trade, export, retail, accounting, tax and financial planning
 - o business: small, medium and large
 - o public
 - o media

STRATEGY

- consolidating all stakeholder intelligence and sharing opportunities
- internal partnership (branches and committee groups)
- inter-govt partnership (ministries e.g. SBE, offices e.g. Service Ontario)
- public private partnership

CHANNELS

- internal information sharing: external stakeholder intelligence database
- personal interaction opportunities: speeches, seminars, booths, job and info fairs
- print and online publications: public and private
- public and media relations efforts: brochures, annual reports, newsletters, posters, flyers, website, e-mail alerts, small business advisory tools, e.g. checklists, forms, trade shows

ISSUES MANAGEMENT

- Harmonization and collaboration among within the ministry and external groups may be challenging. Regular communications coming from executive management is advised.
- All team have to be aware of and in sync with actions and communications before, during and after mandatory blackout periods such as in the event of an election.

TACTICS

Technological Facilitation of Information Sharing

- Consolidate stakeholder contact information and intelligence
 - o build procedures for
 - reporting
 - storage
 - access
 - uploading for use
 - posting onto Executive Dashboard
 - o criteria for the storage and access technology include:
 - compatibility and synchronization with Outlook Calendar and Contact
 - centralized storage of information
 - accessibility from remote locations
 - compatibility with Executive Dashboard
 - ability to define and limit viewers' vs. editors' rights
 - ability to define types of, sort and download specific information
 - compatibility with Blackberry use
 - capability to e-mail all users when updates or calendar items are posted

- technology currently under consideration
 - EASY – used by Community Safety & Correctional Services; Health Promotion; Labour; Municipal Affairs & Housing; Community & Social Services; Environment; Training, Colleges and Universities; Citizenship & Immigration; Public Infrastructure Renewal; OMAFRA
 - Microsoft Business Contact Manager
 - Salesforce.com
 - Other customizable CRM solutions

Internal Communications Partnership

- Align the communication platforms across relevant MOR branches and committees:
 - Revenue Communications
 - CTAR
 - MOST
 - TASB
 - RMBD
 - OTAC
- By:
 - sharing stakeholder contact and activity information
 - sharing responsibilities in handling an engagement requirements:
 - content development
 - content fact-checking
 - content approval
 - content delivery
 - defining level of involvement and recommend opportunity for sharing

Inter-governmental Communications Partnership

- Share information and communication channels with other ministries
 - Start with:
 - Canada Agency Revenue
 - Economic Development and Trade Sector Competitiveness Branch
 - Ministry of Small Business and Entrepreneurship
 - Plan for:
 - Ministry of Research and Innovation
 - Ministry of Agriculture and Food
 - Explore into expanding our efforts to new immigrants with:
 - Ministry of Citizenship & Immigration

Public-Private Communications Partnership

- Partner with relevant external stakeholder groups belonging to the following sectors:
 - Business
 - Trade
 - Professional
 - Taxpayers

- Capitalize on their communications platforms:
 - o Print
 - annual reports
 - newsletters
 - magazines
 - event program books
 - buckslips
 - flyers
 - brochures
 - direct mail
 - press releases
 - information sheets
 - o Online
 - Websites
 - e-mails
 - listservs
 - RSS feeds
 - o Personal Interaction
 - Speeches
 - Events
 - Booths
 - Seminars

Guidelines for Assessing Level of Participation

- Relevant Groups:
 - o Business
 - o Trade
 - o Professional
 - o Taxpayers
- Audience Size: must reach an ultimate audience over of 50 end-users of our services
- Lead Time: enough time for MOR to develop, approve and deliver relevant and accurate content
- Logistics:
 - o within 600 Km of GTA
 - o time-permitting for the representative for attendance and travel
- Relevance:
 - o MOR must have subject matter expertise to develop and deliver content
 - o Event agenda must attract an audience pertaining to MOR key messages
- Representation:
 - o Commissioner to promote MOR for branding
 - o Independent work groups (MOST / CTAR) to promote their own initiatives
 - o Subject Matter Branches to promote their own specialty

PROCESSES

Process of Stakeholder Intelligence Sharing

The ultimate solution will ideally involve one software package which can host all stakeholder intelligence in one database for shared access and definable rights, with a calendar portal with definable views to display engaged opportunities.

In the interim when there is no set database in place yet, all information should be collected and stored in a centralized Excel spreadsheet managed by RC. Engaged events have to be logged onto a TRD events calendar with categories and definable fields, and all relevant information and the completed speaking engagement form should be attached if applicable.

The ministry point of contact should mostly be Revenue Communications, unless where solely the subject matter knowledge of independent work groups (MOST / CTAR) are required, in which case Revenue Communications will be kept informed to possibly make recommendations on opportunity sharing.

Tasks	Responsibility
Investigate on storage and access software package	RC
Submit all stakeholder intelligence and updates from internal sources and partners to central database	ALL
Manage stakeholder intelligence database and access points	RC
Regularly access the information and sort according to their needs to identify suitable opportunities	ALL
Present identified opportunity to RC for consideration of participation or piggyback	USERS
Make recommendation on possible partnership and coordinate with internal parties involved to strike partnership	RC
Implement communication	ALL
Update database with developments and evaluation	RC

Processes for Communications Partnership

Tasks	Responsibility
Work with Canada Revenue Agency	CTAR / RC
Work with Ministry of Small Business and Entrepreneurship	CTAR / RC
Work with Economic Development and Trade Sector Competitiveness Branch	RC
Revenue Communications to align with all other teams	RC
Sharing with CTAR	CTAR / RC
Sharing with MOST	MOST / RC
Sharing with OTAC	OTAC / RC
Sharing with RMBD	RMBD / RC
Sharing with TASB	TASB / RC

Processes for Engagement

Revenue Communications is to be the project leader and central point of information for all opportunities, except for those requiring information only pertaining to subject matter of independent workgroups (MOST / CTAR).

Responsibility	Team
Opportunity assessment	RC
Partnership Recommendation	RC
Engagement Calendarization	RC
Logistics coordination	RC
Content development	RC
Engagement Form	RC
Content fact-checking	MOST CTAR
Content approval	RC
Content delivery	RC
Follow up & evaluation	RC

Responsibility	Team
Opportunity assessment	CTAR
Partnership Recommendation	CTAR RC
Engagement Calendarization	RC
Logistics coordination	CTAR
Content development	CTAR
Engagement Form	CTAR
Content fact-checking	CTAR
Content approval	RC
Content delivery	CTAR
Follow up & evaluation	CTAR

Responsibility	Team
Opportunity assessment	MOST
Partnership Recommendation	MOST RC
Engagement Calendarization	RC
Logistics coordination	MOST
Content development	MOST
Engagement Form	MOST
Content fact-checking	MOST
Content approval	RC
Content delivery	MOST
Follow up & evaluation	MOST

TIMELINES

Task	Time	Resources
Investigate on Storage & Access Software Package	10/07 – 11/07	RC
Work with Canada Revenue Agency	10/07 – 02/08	CTAR / RC
Revenue Communications to align strategies with all teams	10/07 – 02/08	RC
Share communications procedures and channels with CTAR	10/07 – 02/08	CTAR / RC
Share communications procedures and channels with MOST	10/07 – 02/08	MOST / RC
Share communications procedures and channels with OTAC	10/07 – 02/08	OTAC / RC
Share communications procedures and channels with RMBD	10/07 – 02/08	RMBD / RC
Share communications procedures and channels with TASB	10/07 – 02/08	TASB / RC
Recommendations on software	11/07	RC
Approval and decisions on software and costs	11/07 – 12/07	Boni Fox Gray
Work with Ministry of Small Business and Entrepreneurship	11/07 – 02/08	CTAR / RC
Work with Economic Development and Trade Sector Competitiveness Branch	11/07 – 02/08	RC
Purchase and pilot test	12/07 – 01/08	RC
Launch new software and circulate briefing	02/08	RC
Submit all stakeholder information and updates from internal sources and partners to central database	02/08 –	ALL
Manage stakeholder intelligence database and access points	Ongoing	RC
Regularly access the information and sort according to their needs to identify suitable opportunities	Ongoing	ALL
Present identified opportunity to RC for consideration of participation or piggyback	Ongoing	USERS
Make recommendations on possible partnerships; coordinate with internal parties involved to secure partnerships	Ongoing	RC and Teams
Engagement Calendarization	Ongoing	RC
Logistics coordination	Ongoing	RC and Teams
Engagement Form	Ongoing	RC and Teams
Content development	Ongoing	RC and Teams
Content fact-checking	Ongoing	RC and Teams
Content approval	Ongoing	RC
Implement and deliver communication	Ongoing	RC and Teams
Follow up & evaluation	Ongoing	RC and Teams
Update database with developments and evaluation	Ongoing	RC

BUDGET

EASY: The technology is projected to cost around CAD\$13,000 for an unlimited number of users. The price includes iServ hosting, central application support and business-related support and coordination from a Central Database Administrator.

Microsoft Business Contact Manager: We may already have licences for this. It may be a matter of installing that for all required users.

Salesforce.com: Group Edition from \$10/User/Month; Full-Featured from \$65/User/Month

Other CRM Solutions: Costs vary; generally higher in costs; allow more customization and much more powerful, maybe more than what we need.

MEASUREMENTS & EVALUATION

Measurements can mostly be done by studying the Communications Metrics, which show communications statistics by time vs. branch vs. product, among other things. Progress brought about by the consolidated efforts can be tracked against the time when the program was not yet implemented to determine its efficiency, and can also be monitored throughout implementation to identify any progress or areas for improvement as users become more used to the procedures.

- *Effectiveness of Consolidated Stakeholder Intelligence*
 - o compare new database size with previous year
 - o measure total access to database from all access points
 - o measure total number of calendarized entries

- *Effectiveness of Communications Partnerships*
 - o measure the total number of communications products
 - o measure the total number of channels used
 - o measure the total number of teams participated in engagements
 - o measure the total number of shared engagements
 - o measure the total external impression points

CHECKLIST & SIGN-OFF

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