

# Phoenix Lobby Kit

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Public Service Alliance of Canada  
Alliance de la Fonction publique du Canada

# Phoenix Lobby Kit

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Thank you for the work that you are about to do to help thousands of PSAC members who have been impacted by the Phoenix fiasco. Lobbying is an important activity that can be used to move governments, make lasting legislative changes and achieve better working conditions for Canadians.

## In this kit, you will find:

- Campaign-specific messages
- Tips for using the messages
- Tips and tricks for a successful online lobby
- Information on the Member of Parliament
- A fill-in-the-blanks checklist to plan your lobby activities
- A report back form

Remember that your goal is to convince the MP you are lobbying to take action.

MPs are human beings – they will be moved by compelling, factual stories. They'll also be motivated by their own electoral success. They *want* people to appreciate their work and their efforts – they *want* people to vote for them. Your job is to convince them that taking action is good for workers because it's the right thing to do, and also that it could help them gain support in future elections.

Read through the kit at your own pace and reach out to your [PSAC regional representative](#) for help with planning your lobbying activities.

Happy lobbying!

## Objectives

**Thank you for participating in this lobby effort. Our objectives are:**

- to educate Members of Parliament about the Phoenix pay system and the financial hardships and stress **it is still causing our members.**
- to inform MPs that our members are frustrated and angry due to more than six years of ongoing pay issues.
- to remind Members of Parliament that federal public service workers continue to deliver frontline services to Canadians throughout the pandemic despite still not getting paid correctly.
- to get a commitment from the MP to support our key "asks" of the government.
- to make it clear to government MPs that they must urge Prime Minister Justin Trudeau and their colleagues who have agency in these matters to respect and support public service workers by fulfilling our demands.

## Background

In June 2011, the Harper government contracted IBM to develop a new payroll system for the federal government. When they consolidated the federal public service pay system, hundreds of compensation advisors were laid off and their years of expertise and experience were lost.

By the time the project was passed onto Justin Trudeau's Liberal government, it was already clear Phoenix was plagued with problems. Despite PSAC and other unions sounding the alarm, Trudeau's government went ahead and launched the pay system in 2016.

Since then, over 200,000 federal public service workers and their families have been impacted by Phoenix. Some have not been paid properly, others have gone unpaid for months at a time. Many have experienced debt, loss, bankruptcy – even homelessness.

Admitting defeat, in early 2018 the government publicly announced that they would be scrapping the Phoenix pay system. Later that year they launched the process to design a new pay roll system. The government has been discussing replacement options with several new vendors.

In April 2019, the government offered a settlement to all federal public sector unions which included a maximum of 5 days paid leave, that was not guaranteed cashable, and an expanded expense claims process that would exclude many PSAC members' claims. PSAC rejected the offer with the overwhelming support of its membership.

In 2020, PSAC reached an equitable settlement. Instead of the five days paid leave, we negotiated a \$2,500 lump sum payment for all members impacted by the Phoenix pay system. The new agreement also includes an improvement to the current claims process for out-of-pocket expenses and financial losses and compensation for severe impacts.

Payments for the current employees started in March 2021. Retirees and former employees had to wait until fall of 2021 to fill their claims.

Unfortunately, the employer decided the Phoenix compensation for damages was taxable. PSAC asked Canada Revenue Agency to review this wrongful decision, but Treasury Board refused to cooperate.

To ensure a prompt resolution of this dispute impacting thousands of members, PSAC has proposed to CRA that both parties jointly request that the dispute be resolved by the Tax Court. This would expedite the process and avoid thousands of individual appeals.

## Making the pitch and framing our key demands

***\*\*\* Ensure, whenever possible, that you connect either federal public service jobs, or services that the MP's constituents rely on, with the specific riding. If possible, prepare a personal story. It will help to bring it home. \*\*\****

- The Phoenix pay system has been financially and psychologically devastating for tens of thousands of PSAC members. It started with massive financial loss as workers lost their homes, their cars and their savings, and has continued with constant pay shortfalls and errors for over six years now.
- Incredibly, six years later, there is no end in sight for the Phoenix pay fiasco.
- There are still more than 141,000 Phoenix cases in the backlog, with new ones created every single day.
- Our ordeal won't be over until the government puts in place a pay system that pays us accurately and on time, every time – but that's still years away – so the only solution right now is hiring more compensation advisors.
- Public service workers want to see an end to their pay problems. We deserve to be paid correctly, and when issues arise, to have them resolved quickly, with concrete timelines for pay issues to end.
- We want the peace of mind knowing the government – our employer – is doing everything in their power to make this right.

## **Our key demands**

### **1. Hire more compensation advisors to fix pay problems and prevent future issues**

- More compensation advisors are desperately needed to fix the Phoenix issues created every day, and to eliminate the growing backlog of cases.
- It's the only path forward to bring relief to workers.
- Working in compensation with a broken pay system is a difficult and stressful job. This has caused problems with hiring and retention. The government should renew the recruitment and incentive package for compensation advisors to attract and keep these highly trained staff.

### **2. Support PSAC's call for ongoing damages compensation**

- PSAC members received general damages for the hardships caused by Phoenix from 2016 to 2019, but the problems never stopped.
- Since then, workers still haven't been paid properly, and workers deserve additional compensation for the pain and suffering they continue to endure.
- The claims process for expenses and major losses should also be available to our members as long as they continue to experience hardships.

### **3. Make Phoenix general damages compensation non-taxable**

- Phoenix damages were negotiated to compensate for the pain and suffering caused by years of pay issues and should be tax-free.
- But Treasury Board and Canada Revenue Agency have refused to review the taxability of Phoenix damages.
- If the taxation issue is not resolved, tens of thousands of workers may have no choice but to file individual tax appeals to Canada Revenue Agency.

### **4. Properly consult and engage with unions and federal workers on the next pay system**

- When our members warned Phoenix wasn't ready, the government didn't listen, and federal workers paid the price. That can't happen again.
- We expect the government to thoroughly test the next pay system and consult with compensation advisors and the workers who'll be paid by it before launching Phoenix's replacement.

## **5. Launch a national inquiry into the Phoenix pay disaster**

- The Phoenix pay fiasco is a national disgrace that has cost taxpayers billions of dollars and affected hundreds of thousands of Canadians.
- There has been virtually no accountability or investigation into the rollout or impact of Phoenix aside from the Auditor General's report in 2017.
- Federal public service workers and Canadian taxpayers deserve a national inquiry into Phoenix to make sure this disaster is never repeated.

*Please urge the Prime Minister to act now, so public service workers no longer have to suffer from the Phoenix disaster.*

## **Questions for Government MPs**

- Will you ask the Minister of National Revenue Diane Lebouthillier for Canada Revenue Agency to review its ruling on the taxability of Phoenix general damages?
- Will you ask your government to commit to a concrete timeline to resolve outstanding pay issues and eliminate the Phoenix case backlog?
- Will you ask Treasury Board President Mona Fortier and Minister of Public Services and Procurement Filomena Tassi to commit to hiring more compensation advisors to fix pay issues and eliminate the backlog of cases?
- Will you commit to supporting our call for general damages to be paid for workers who are still being impacted by Phoenix every day?
- Will you urge Prime Minister Justin Trudeau to bring accountability to the table by calling a national inquiry into Phoenix to prevent a similar disaster from ever happening again?

## **Questions for opposition MPs**

- Will you commit to ask these questions to the government?

## **LOBBY MEETING CHECKLIST**

### **Before the meeting:**

- Research the Member of Parliament. A quick check on Google and Facebook can tell you what particular interests your MP has and who their connections are in the community. This will help frame your approach and discussion at the meeting. The profile on the MP on the [Parliamentary website](#) will tell you what Parliamentary committee(s) the MP is a member of.
- Call or email your MP to request a meeting.
- Follow up to confirm the meeting details prior to the appointment and determine how long your meeting is.
- Review the materials in this kit to get a clear understanding of the issue and what we are asking for.
- Have a team meeting with your fellow PSAC activists and rep in preparation:
  - review how long you have with the MP and plan how you will stay within the allotted time;
  - review the points you will raise with the MP;
  - review answers to possible objections the MP may raise;
  - review the commitments you want to obtain from the MP;
  - determine who will say what during the meeting;
  - decide who will take notes;
  - assign someone to complete the lobby report after the meeting.
  - Run through your points a couple of times

## **Resources for a successful online lobby**

### **Before your meeting:**

- Determine what accessibility supports you might need – simultaneous interpretation, etc.
- Set up and check your tech
  - › Background uploaded
  - › Headset charged
  - › Quiet room
  - › Practice your talk a few times – record it and play it back to see how it looks and sounds
- Make a contingency plan for cancellations or tech problems (have an understudy!)

### **The day of...**

- Log on a few minutes early. Check your tech. Wear a headset – it's easier for all.
- Remember to breathe. Settle into your seat and take a breath before you begin your remarks.
- Make eye contact with the camera from time to time (or always, if you don't need to refer to your notes).
- Pause from time to time to see if the MP has questions or comments.
- Make notes when the MP asks questions or comments.
- Take time to respond.
  - › It's okay to say, "I don't know, but will find out and get back to you".
- Remember to finish with an ask and a commitment
  - › "Will you commit to xxx? When will you xxx?"
- Get a photo – screen cap!
- Thank them for the meeting

## **During the meeting:**

- Introduce yourselves – say what you do and where you’re from. Thank the MP for the meeting and confirm how long you have.
- Present your position clearly and don’t be sidetracked.
- Listen, but don’t let the MP talk so much that you don’t get a chance to speak.
- Answer questions to the best of your ability. Make a commitment to follow-up if you don’t have immediate answers.
- Ask the MP to take specific action(s) and take very accurate notes when they explain why they will or won’t take those actions. If you aren’t sure you understood the commitment(s), re-confirm with the MP.
- Have ready online copies of the lobby document to be sent the MP and their aides.
- Leave any lobby materials and your contact information with the MP. Thank them for meeting with you.

## **After the meeting:**

- Debrief with your team right after the meeting. Decide what follow-up action is needed, who will do it, and when.
- Send a follow-up letter thanking the MP for the meeting and their support. Provide any follow-up information you agreed to provide. Remind the MP of any actions she or he agreed to take.

## **Report to PSAC:**

PSAC is keeping a data base of information on meetings with MPs and other relevant information. It is important that you complete the lobby report form after each meeting with an MP. Make sure this responsibility is assigned before the meeting.

### **Each report should contain the following information:**

- when the meeting took place;
- who was there (PSAC members, staff, the MP and any of her/his staff);
- what you talked about;
- key statements by the MP (make sure you record these accurately);
- any commitments made by the MP (again, be sure to include accurate quotes);
- any follow-up tasks.

Your report should be completed as soon as possible after every meeting and sent to Tasia Brown ([brownnt@psac-afpc.com](mailto:brownnt@psac-afpc.com)).

## **LOBBY REPORT BACK FORM**

Once complete, send back to Tasia Brown (PSAC Communications) at [brownt@psac-afpc.com](mailto:brownt@psac-afpc.com)

**NAME OF MP:** \_\_\_\_\_

**CONSTITUENCY:** \_\_\_\_\_

**DATE OF MEETING:** \_\_\_\_\_

**LOCATION OF MEETING:** \_\_\_\_\_

**TIME OF MEETING:** \_\_\_\_\_

**LENGTH OF MEETING:** \_\_\_\_\_

**REASON FOR BEING THERE:** \_\_\_\_\_  
\_\_\_\_\_

### **PARTICIPANTS:**

Constituency team:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Others present:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **GENERAL COMMENTS ON MEETING:**

(Include attitude, whether MP interested, etc.)

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**MP's RESPONSE:**

(Both to general and to specific points)

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**COMMITMENTS BY MP:**

(Be as specific as possible – confirmation letter should contain these points)

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**FOLLOW-UP:**

When: \_\_\_\_\_

Person responsible: \_\_\_\_\_

What needs to be included in your follow up email/phone call? (always include a thank you!)

- A request for information the MP/Senator promised you
- Answer(s) to questions the MP/Senator asked you
- Request for a meeting in the constituency

Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date completed: \_\_\_\_\_

## **GENERAL COMMENTS:**

(Attach additional comments if necessary)