

Certificate of Recognition Program CP Initiatives Workplan Template 2023 Updated Version

As part of the ongoing effort to support the Certifying Partners (CPs) in planning, reporting on, and assessing activities and outcomes, WorkSafeBC has reviewed and updated the CP Initiatives Workplan Template.

In 2023, WorkSafeBC gathered feedback from the CPs on the Initiatives Workplan Template. We appreciate your feedback and have reviewed and analyzed the challenges and recommendations raised. The goals of this revised CP Initiatives Workplan Template are to:

- Address major challenges that the CPs have identified in the current CP Initiatives Workplan Template
- Align the CP Initiatives Workplan Template format with other WorkSafeBC templates (e.g. HSA Workplan Template) to ensure consistency
- Improve reporting on initiative outcomes

Effective from May 2023, the revised CP Initiatives Workplan Template will be used by the CPs. The CP Initiatives Workplan Template will help you:

- **Align** your initiatives, activities, and outcome measures with your strategic objectives/goals outlined in the Standards & Guidelines and the Agreement.
- **Plan** your initiatives or endeavours by outlining the activities to be accomplished, inputs needed, budget required, timeframes to follow, and outcome anticipated.
- **Manage** implementation of your initiatives by enabling you to track implementation against expectations
- **Report** on your progress in implementing the initiatives by sharing information in the "Workplan Measurement" section, and evaluate your outcomes by identifying the
 - Outcome Indicators
 - Compare year-over-year results
 - Outcomes achieved at the end of the fiscal year

WorkSafeBC expects the CP Initiatives Workplan will reflect the scope and cost of your initiatives and assist by assigning a dollar value against the CP's overall budget. Workplans are not intended to include all activities or initiatives undertaken by your organization in the upcoming year. Rather, focus on your **"key initiatives" or activities** you will undertake to address contractual obligations and impact the primary trends within your industry. You will explain what you are going to emphasize in the coming year.

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Section A: CP Overview

CP Name	<i>Energy Safety Canada</i>
Year of Workplan	<i>2024</i>

CP Vision *(if not applicable type N/A)*

Energy Safety Canada is a respected globally recognized authority with deep oil and gas safety expertise to improve safety performance. Energy Safety Canada's mission is to work on behalf of the Oil and Gas Industry to drive safe work performance through:

- performing analysis to facilitate knowledge sharing and continuous improvement
- driving safety standardization
- delivering an effective learning system
- providing support to employers and workers
- communicating, marketing, and advocating on behalf of Energy Safety Canada and Industry

CP Mission *(if not applicable type N/A)*

Energy Safety Canada is a trusted Health and Safety authority, responsive to change while utilizing a collaborative and disciplined approach to proactively improve safe work performance. The strategic objectives of the Energy Safety Canada include Safety Centre of Excellence; Support Workers to Work Safely; Support Employers to Improve safety performance and Communications & engagement.

Section B: Summary of Mandates

This document is to be completed as you see fit within the parameters of the provided mandates. You may add as many rows as you require depending on the level of detail you wish to include. After providing the objectives and activities for each of the five pre-populated Certifying Partner mandates, you have the option to add more objectives and action plans, if applicable.

Mandate:	<i>The excerpts provided come directly from the Certificate of Recognition Program- Standards and Guidelines (January 2011) and funding Agreements (signed annually) and have been provided for consistency and direction.</i>
Objective/Initiative:	<i>The objectives should relate directly to the mandates selected from the Standards and Guidelines and Agreements (above).</i>
Activities:	<i>Outline the plan to achieve the objectives/initiatives and include detailed information on resources, finances, and KPIs.</i>

Objectives/initiatives are based on the following mandates:

1. Set objectives to develop and implement a marketing strategy to promote the COR Program. *Reference: S&G 1.2 and Agreement 2.(c)(ii)*
2. Set service delivery and infrastructure objectives to facilitate the certification of employers and administration of the COR program. *Reference: S&G 1.3 & Agreement 2.(c)(iii)*
3. Set objectives to train, qualify, and monitor performance of internal auditors to meet the demands of COR program participation. *Reference: S&G 1.4 & Agreement 2.(c)(iv)*
4. Set objectives to train, qualify, and monitor performance of external auditors to meet the demands of COR program participation. *Reference: S&G 1.10 & Agreement 2.(c)(iv)&(x)*
5. Set objectives to maintain processes to provide verification and quality assurance oversight. *Reference: S&G 1.11 & Agreement 2.(c)(xi)*
6. Other (optional)

Section C: Summary of Strategic Objectives

Based on the mandates in Section B. and the information from your strategic plan, please kindly summarize (at a high level) the strategic objectives/priorities under each Mandate of your organization for the upcoming year, then add the **key initiatives** that your CP has planned out under each objective/priority. In most cases, you will have one or more objective for each mandate and one or more initiative under each objective.

Mandate #	Strategic Objective/Priority	Key Initiative (note: there could be multiple initiatives under the same strategic objective)	Time Frame	KPI
1	Develop and implement a marketing strategy to promote the COR Program	Provide communications on key messages to stakeholders both in the COR program currently and those that are potential COR holders.	As per schedule with publication vendor	Approximately 8,632 stakeholders reached overall.
2	Facilitate the certification of employers and Administration of the COR Program	Develop annual Goals & Objectives based on ESC Strategy Articulation Map (SAM) that encompasses activities for the delivery of the COR Program.	Q1 Develop Goals & Objectives Q2 - Q4 Deliver and Report	+/-5% meeting expectations
3	Train and qualify internal auditors. Monitor performance of internal auditors to meet the demands of COR program participation	Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this. Initiate and assign resources for the implementation of the Workshop Program	N/A Q1 Develop Workshop topics and schedule Q2-Q4 Complete Workshops and Webinars	Provide 4 presentations or info Sessions

4	<p>Train and qualify external auditors.</p> <p>Monitor performance of external auditors to meet the demands of COR Program</p>	<p>Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this.</p> <p>Conduct CP Initiated Verification Audits (CPIVA's) previously known as On-site Audit Reviews (OSAR)</p> <p>Initiate and assign resources for the implementation Workshop Program</p>	<p>N/A</p> <p>Q1 Plan necessary CPIVA's</p> <p>Q2 - Q4 Implement and manage process</p> <p>Q1 Develop Workshop topics and schedule</p> <p>Q2-Q4 Complete Workshops and Webinars</p>	<p>Complete 6 CPIVA's by end of Q4</p> <p>Provide 4 presentations or info Sessions</p>
5	<p>Maintain processes to provide verification and quality assurance oversight.</p>	<p>a. Conduct WIVA audits, as assigned by WSBC</p> <p>b. Communicate results and follow-up through the Auditor Performance Management program if required.</p>	<p>Q1 Plan necessary OSAR and WIVA's</p> <p>Q2 - Q4 Implement and manage process</p>	<p>Complete 100% of final assigned WIVA's - 5% for any deemed not eligible</p>

Section D: Workplan Templates

Based on the objectives and initiatives you have identified in [Section C](#), indicate the **key activities you will undertake for the objectives/initiatives created for each Mandate** (focus on activities that will incur high budget/cost). Below are the workplan templates for mandates 1 to 5 pre-copied for you and a blank workplan to add more activities, if applicable. Each mandate has one workplan template with initiatives/activities and a measurement template to track the expected outcomes/KPIs. Please click on the "expanding sign" on the left of the heading to expand the template and fill out one or more for each mandate or objective. Please add additional rows or work plans as needed and update the template numbers accordingly. **Please complete one workplan for each initiative.**

Workplan Template Mandate 1.0

Mandate	Mandate 1. Set objectives to develop and implement a marketing strategy to promote the COR Program. Reference: S&G 1.2 and Agreement 2.(c)(ii)
Objective	Develop and implement a marketing strategy to promote the COR Program
Initiative Goal/ Expectation	<ul style="list-style-type: none"> a. Provide communications on key messages to stakeholders both in the COR program currently and those that are potential COR holders. b. Intend to develop key messages to reach stakeholders as it relates to the COR program.

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Develop key messages for digital ad copy and implement	Marketing/Outreach Other type:	Create applicable messages for ad copy. Messages should support information related to the COR	\$10,000	March 1 - April 15	Key messages ready with outline of content for Communications department to work on.	

		program and auditing			Reach potential new business to share ESC services Approximately 8,632 stakeholders reached overall.	
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You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided a number of applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved
# of certifications*	36	38	38		<ul style="list-style-type: none"> For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
# of registrations*	36	36	25		
Stakeholders without COR are more aware of benefits of COR program for Oil and Gas industry	Approximately 9,000 stakeholders reached overall.	Approximately 8,632 stakeholders reached overall.	Approximately 5,000 stakeholders reached overall.		

*The KPIs in the white cells were moved from the budget template to the Workplan Template

**Formula: (Total CP employers in year of measure - Prior year) / (Total CP employers in year of measure)

Workplan Template: Mandate 2.0

Mandate	<i>Mandate 2. Set service delivery and infrastructure objectives to facilitate the certification of employers and administration of the COR program. Reference: S&G 1.3 & Agreement 2.(c)(iii)</i>
Objective	Deliver the Certificate of Recognition (COR) Program
Initiative Goal/ Expectation	Develop annual Goals & Objectives based on ESC Strategy Articulation Map (SAM) that encompasses activities for the delivery of the COR Program.

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Implement the 2024 Goals & Objectives plan	Program Development Other type:	Quarterly Stewardship meetings to monitor progress		Q1 – Q4	As per plan	

You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided the applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved <ul style="list-style-type: none"> For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
Delivery of 2024 COR Annual Goals & Objectives plan	+/-5% meeting expectations	+/-5% meeting expectations	+/-5% meeting expectations		

*# of CP employees / # of certified employers

Workplan Template: Mandate 3.0

Mandate	<i>Mandate 3. Set objectives to train, qualify, and monitor performance of internal auditors to meet the demands of COR program participation. Reference: S&G 1.4 & Agreement 2.(c)(iv)</i>
Objective	Monitor performance of internal auditors to meet the demands of COR program participation
Initiative Goal/ Expectation	Initiate and assign resources for the implementation of the Workshop Program

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
*Note: Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this. We do however provide workshops and webinars so have provided workplan information on these for this section.						
Develop Workshop topics and schedule.	Auditor Training Other type:	Determine new material to be developed and implement development plan	See Mandate 4.0 for combined approach (workshop include both Internal & external auditors)	Jan – March	A minimum of 4 sessions completed	
Complete Workshops and Webinars	Auditor Training Other type:	Provide sessions on new topics to stakeholders	See Mandate 4.0 for combined approach	April - Oct	Key topic areas are explained in a learning environment	

You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided the applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator* (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved <ul style="list-style-type: none"> For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of Workshop sessions held	4	4	4		
# of Internal Auditors Trained for the First Time (Initial) - Large Employers*	7	5	5		
# of Internal Auditors Recertified - Large Employers*	30	66	40		
# of Internal Auditors Trained for the First Time (Initial) - Small Employers*	40	50	50		
# of Internal Auditors Recertified - Small Employers*	44	50	50		

*The KPIs in the white cells were moved from the budget template to the Workplan Template

** # of internal auditors that did not recertify / Total internal auditors

Workplan Template: Mandate 4.0

Mandate	<i>Mandate 4. Set objectives to train, qualify, and monitor performance of external auditors to meet the demands of COR program participation. Reference: S&G 1.10 & Agreement 2.(c)(iv)&(x)</i>
Objective	Monitor performance of external auditors to meet the demands of COR program participation
Initiative Goal/ Expectation	Initiate and assign resources for the implementation of the Workshop Program. Conduct CP Initiated Verification Audits (CPIVA's) previously known as On-site Audit Reviews (OSAR)

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
*Note: Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this. We do however provide workshops and webinars so have provided workplan information on these for this section.						
Develop Workshop topics and schedule.	Auditor Training Other type:	Determine new material to be developed and implement development plan		Jan – March	A minimum of 4 sessions completed	
Complete Workshops and Webinars	Auditor Training Other type:	Provide sessions on new topics to stakeholders	2,500	April - Oct	Key topic areas are explained in a learning environment	
Plan and conduct CPIVA's	Auditor QA Other type:	Assess upcoming audits list and plan	2,500	March – October	Schedule of 6 CPIVA's to complete	

You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided the applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved • For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
# of CPIVAs* for Auditor Quality Assurance	6	6	6		
# of Auditors with corrective findings resulting from an OSAR	1	1	1		
# of CPIVAs as a percentage of total external auditors (<i>S&G Requirement: 10%</i>)	10%	10%	10%		
# of External Auditors Recertified**	17	15	15		
# of external auditors trained for the first time (Initial) (<i>if applicable</i>)**	44	30	30		

* CPIVA Definition: Certifying Partner Initiated Verification Audits

**The KPIs in the white cells were moved from the budget template to the Workplan Template

*** # of external auditors that did not recertify / Total external auditors

Workplan Template: Mandate 5.0

Mandate	Mandate 5. Set objectives to maintain processes to provide verification and quality assurance oversight. Reference: S&G 1.11 & Agreement 2.(c)(xi)
Objective	<ul style="list-style-type: none"> a. Conduct WIVA audits, as assigned by WSBC b. Communicate results and follow-up through the Auditor Performance Management program if required.
Initiative Goal/ Expectation	Complete 100% of final assigned WIVA's - 5% for any deemed not eligible

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Plan and arrange to conduct necessary WIVA audits	Employer Audit QA (WIVA) Other type:	Receive List of audits and plan	70,000	January – October	Schedule of 10 WIVA's to complete	

You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided the applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved <ul style="list-style-type: none"> For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
# of WIVAs	5	8	10		
# of WIVAs as a percentage of total employers	.96%	1.5%	2%		
# of Employers with corrective findings resulting from a WIVA being actioned	1	1	1		

Workplan Template: Mandate 6.0 (Optional)

Mandate	Choose an item.
Objective	<i>Click here to enter text.</i>
Initiative Goal/ Expectation	<i>Click here to enter text.</i>

Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 1: Workplan Details List the key activities you will undertake in this initiative.						
Activity Description	Activity Category <i>(Note: this should align with info from your budget template)</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
	Choose an item. Other type:					
	Choose an item. Other type:					
	Choose an item. Other type:					
	Choose an item. Other type:					

You must report outcomes using the same workplan template (outlined below) and submit to WorkSafeBC with the annual report, according to the timeline specified in the funding contract. We have provided the applicable KPIs for each Mandate. The rows highlighted in **gray** are optional KPIs. If you choose, additional blank rows can be added to track more outcomes. Please fill out below **columns highlighted in blue** when you complete the workplan. The **orange column** needs to be completed at the end of the fiscal year when all activities are completed.

Part 2: Workplan Measurement					
Outcome Indicator (e.g. KPI)	2022 Actuals	2023 Estimate	2024 Forecast	Year End Results	Evaluate Outcomes Achieved <ul style="list-style-type: none"> • For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>

WorkSafeBC Management Comments

Board Chair Approval

Steve Reynish

Steve Reynish

9/30/2023 | 2:11:53 PM MDT

Name

Signature

Date