

CP Initiatives Workplan Template

2025 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 (Health and Safety Association) 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>2025</i>

CP Vision <i>(if not applicable type N/A)</i>
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 <i>(if not applicable type N/A)</i>
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:

- Set objectives to develop and implement a marketing strategy to promote the COR Program. *Reference: S&G 1.2 and Agreement 2. (c)(ii)*
- 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)*
- 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)*
- 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)*
- Set objectives to maintain processes to provide verification and quality assurance oversight. *Reference: S&G 1.11 & Agreement 2. (c)(xi)*

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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	<i>Develop and implement a marketing strategy to promote the COR Program.</i>	Provide communications on key messages to stakeholders both in the COR program currently and those that are potential COR holders. Target Audience: ESC (Energy Safety Canada) assigned BC (British Columbia) (British Columbia) Industry Codes.	As per schedule with publication vendor.	<i>Reach 8,000 stakeholders</i>
2	Facilitate the certification of employers through the 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	a. Train and qualify internal auditors. b. Monitor performance of internal auditors to meet and uphold COR program requirements.	a. Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this. b. Initiate and assign resources for the implementation of the: - Workshop Program - Auditor Engagement Program.	N/A - Q1 Develop Workshop topics and schedule. - Q2-Q4 Facilitate 5 Workshops and Webinars. - Q2-Q4 On-demand target 8 per year	Host 2 Auditor and Program Development Courses for BC Auditors. Conduct 5 SA&C (Safety Audits & Certifications) Workshop/Webinars or Information Sessions by end of Q4. Target 8 - 1 on 1 Employer Engagements Complete 3 Internal Auditor SPIVAs by end of Q4

4	Train and qualify external auditors. Monitor External Auditor performance to meet and uphold COR Program requirements.	Delivery of Auditor training is managed by the ESC Training Delivery Department. The funding requested for COR does not include this. Conduct CP Initiated Verification Audits (CPIVA's). Initiate and assign resources for the implementation of the SA&C Workshop/Webinar Program.	N/A Q1 Plan necessary CPIVA's. Q2 - Q4 Implement and manage process. Q1 Develop Workshop topics and schedule. Q2-Q4 Complete Workshops and Webinars	Host 2 Auditor and Program Development Training Courses for BC Auditors. Complete 3 Internal Auditor SPIVAs by end of Q4. Conduct 5 SA&C Workshop/Webinars or Information sessions by end of Q4.
5	Maintain processes to provide verification and quality assurance of the COR Program.	1. Conduct WIVA audits as assigned by WSBC. a. Communicate results and follow up through the Auditor Engagement Program as required. 2. Conduct CPIVA audits a. Communicate results and follow up through the Auditor Engagement Program as required.	Q1 OSAR and WIVA Planning Q2 - Q4 Implement and manage Quality Assurance program (WIVA & CPIVA) activities.	Complete 100% of WSBC assigned WIVAs. - 5% for any audits deemed ineligible. Complete 3 External Auditor SPIVAs by end of Q4.

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	<i>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)</i>
Objective	<i>Develop and implement a marketing strategy to promote the COR Program.</i>
Initiative Goal/ Expectation	<i>Provide key messages to stakeholders both in the COR Program currently and those that are potential COR holders. Develop and deliver key COR Program messages to stakeholders.</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
Develop COR Program Marketing material to promote the COR program.	Marketing/Outreach	Create COR program messages for digital	\$2,000	Campaign 1 - Jan - Mar 2024	COR Program Marketing Brochure included in promotional events.	Campaign 1: Targeted audiences included:

		ad campaign.		Campaign 2 -	Development of COR Program Digital marketing material. • ESC-supplied, targeted BC employers • BC oil and gas health and safety roles • Deliverables included: • Health check quiz • Digital ads • COR landing page on ESC's website • Oil and Gas Executives with operations in BC • Ad-management on LinkedIn	Campaign 2 -
Distribute COR Program Marketing material to promote the COR program.	Marketing/Outreach	Distribute COR Brochure/ marketing materials & QR Code for public events	8,000	Q2 2025	Marketing materials fully distributed as per SA&C Communications 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 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)	2023 Actuals	2024 Estimate	2025 Forecast	Year End Results	Evaluate Outcomes Achieved For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of certifications*	36	38	35		___ new SECOR certifications ___ new COR certifications Total of ___ new Certifications
# of registrations*	36	25	35		___ New SECOR Registrations ___ New COR Registrations Total of ___ new Registrations.
Net growth/decrease of certified employers**					

*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	<i>Deliver the Certificate of Recognition (COR) Program.</i>
Initiative Goal/ Expectation	<i>Develop annual goals and objectives based on Energy Safety Canada Articulation Map (SAM) that encompasses activities for the delivery of the COR Program.</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
Implement the 2025 Goals and Objectives plan	Program Development	Quarterly stewardship meetings to monitor progress.	427,896	Q1-Q4	As per plan.	
	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)	2023 Actuals	2024 Estimate	2025 Forecast	Year End Results	Evaluate Outcomes Achieved For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
Delivery of 2025 COR Annual Goals & Objectives plan	+/- 5% meeting expectations	+/- 5% meeting expectations	+/- 5% meeting expectations	Meeting expectations	
Avg. # of days to enter the audits in iCOR from the audit date					
% of staff employed to # of certified employers*					
Employers experience survey results (<i>if applicable</i>)					

*# 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	<i>Monitor performance of internal auditors to meet the demands of COR program participation.</i>
Initiative Goal/ Expectation	<i>Initiate and assign resources for the implementation of the workshop program</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
Develop Workshop and Webinars topics and schedule.	Auditor Training	Determine new material to be developed and implement development plan		Jan – March	A minimum of 5 sessions completed in FSJ	
Complete Workshops and Webinars	Auditor /Small Employer Training	Provide sessions on new topics to stakeholders	\$40,000	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)	2023 Actuals	2024 Estimate	2025 Forecast	Year End Results	Evaluate Outcomes Achieved For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of workshop sessions held	13	4	5		
# of Internal Auditors Trained for the First Time (Initial) - Large Employers*	4	4	5		
# of Internal Auditors Recertified - Large Employers*	8	5	5		
# of Internal Auditors Trained for the First Time (Initial) - Small Employers*	14	40	40		
# of Internal Auditors Recertified - Small Employers*	61	50	60		
# of internal auditor training participants as a % of certified employers.					
# of internal auditor training courses offered					
% of Internal Auditors that did not Recertify of total internal auditors**					

*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	<i>Monitor performance of external auditors to meet the demands of COR program participation.</i>
Initiative Goal/ Expectation	<i>Initiate and assign resources for the implementation of the workshop program. Conduct CP Initiated verification audits (CPIVAs).</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
Develop workshop topics and schedule.	Auditor Training	Determine workshop material, develop material, schedule workshops, and implement the workshop plan		Jan - Mar	5 Sessions completed and schedule defined	
Delivery workshops	Auditor Training	Provide session relevant to the COR program to stakeholders	39,500	April - Nov	Key topics are explained in learning environment. Workshops are interactive and allow for 2-way communication.	
Plan and conduct CPIVAs	Auditor QA	Assess upcoming audit lists, resource assignment and schedule		Mar - Oct	Schedule and completion of 3 CPIVAs.	

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)	2023 Actuals	2024 Estimate	2025 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	4	6	3		
# of CPIVAs as a percentage of total external auditors (S&G Requirement: 10%)	11%	20%	10%		
# of External Auditors Recertified**	22	15	15		
# of external auditors trained for the first time (Initial) (if applicable)**	10	30	30		
# of trained external auditors per # of large employers					
% of External Auditors that did not Recertify of total external auditors***					
# of external auditor training courses offered (if applicable)					

* 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	<i>Mandate 5. Set objectives to maintain processes to provide verification and quality assurance oversight. Reference: S&G 1.11 & Agreement 2.(c)(xi)</i>
Objective	<i>Conduct WIVA audits as assigned by WSBC Communicate results and follow up through the Auditor Performance Management Program if required.</i>
Initiative Goal/ Expectation	<i>Complete 100% of final assigned WIVAs -5% for any deemed not eligible.</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
Plan and arrange to conduct necessary WIVA audits	Employer Audit QA (WIVA) Other type:	Receive List of audits and plan	85,000	January – October	Schedule of 8 WIVA's and completion of 8 WIVAs as per the 2025 WIVA Preliminary List.xlsx	
	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)	2023 Actuals	2024 Estimate	2025 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 WIVAs	9	3	8		
# of WIVAs as a percentage of total employers			4%		
# of Employers with corrective findings resulting from a WIVA being actioned					

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)	2023 Actuals	2024 Estimate	2025 Forecast	Year End Results	Evaluate Outcomes Achieved For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>

WorkSafeBC Management Comments

Board Chair Approval

Name

Signature

Date