

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.

Table of Contents

Section A: CP Overview	3
Section B: Summary of Mandates	3
Section C: Summary of Strategic Objectives	5
Section D: Workplan Templates	6
Workplan Template Mandate 1.0	7
Workplan Template: Mandate 2.0	9
Workplan Template: Mandate 3.0	11
Workplan Template: Mandate 4.0	13
Workplan Template: Mandate 5.0	15
Workplan Template: Mandate 6.0 (Optional)	17
WorkSafeBC Management Comments	18
Board Chair Approval	18

Section A: CP Overview

CP Name	<i>SafetyDriven – Trucking Safety Council of BC</i>
Year of Workplan	<i>2024</i>

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

To eliminate workplace injuries and fatalities in the British Columbia trucking, moving and storage, and related industries.

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

An industry-led association dedicated to reducing injuries and fatalities through leadership, programs, services, communication, and certification.

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	To develop and implement a communication plan that covers COR promotion that keeps employers informed about the program	SafetyDriven will engage in various advertising/marketing activities to promote COR. This will be done in concert with efforts to promote the HSA portion of the organization.	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • Net new COR registrations (Minimum of 70) • Net new COR certifications (Minimum of 50)
2	To receive applications from interested employers within the classification units SafetyDriven is responsible for and administer the COR program efficiently	SafetyDriven will administer the COR program and review its internal procedures to ensure that the process runs smoothly.	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • New process efficiency reports (incl. avg days to enter into iCOR)
3	To ensure that appropriate COR auditor training is made available to employers	SafetyDriven will develop training in health and safety management or ensure such training is available to employers through a third party.	Q1 to Q4 (Ongoing)	<p><u>Internal Auditors</u></p> <ul style="list-style-type: none"> • Large: <ul style="list-style-type: none"> • New (Minimum 30) • Recertified (All required) • Small: <ul style="list-style-type: none"> • New (Minimum 40) • Recertified (All required)

4	To ensure that appropriate COR auditor training is made available to external auditors	SafetyDriven will develop training in or ensure such training is available to external auditors through a third party.	Q1 to Q4 (Ongoing)	<u>External Auditors</u> <ul style="list-style-type: none"> • New (0) • Recertified (All required)
5	To confirm that employers seeking COR certification are registered with WorkSafeBC, have completed training, and have successfully completed a health and safety management audit.	SafetyDriven will perform detailed review of all COR audits, ensuring that audit process deficiencies are remedied as required.	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • All required WIVAs completed • (As directed by WorkSafeBC) • All required CPIVAs completed (Minimum 4) • Quality assurance on all employer audits completed

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	To develop and implement a communication plan that covers COR promotion that keeps employers informed about the program
Initiative Goal/ Expectation	SafetyDriven will engage in various advertising/marketing activities to promote COR. This will be done in concert with efforts to promote the HSA portion of the organization.

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
Business Development Events	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding Finance and Operations Manager Admin Team COR Team SAS Team Consultants (development and delivery) 	\$20,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> 12 regional business development events (webinar/workshops (virtual or in person) or pop-up safety shops across the province) 	
Events	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding 	\$7,500	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> SafetyDriven TSCBC Booth (minimum 4 events) Employee safety engagement events as 	

		<ul style="list-style-type: none"> • Finance and Operations Manager • Admin Team • COR Team • SAS Team Graphic Design & IT Consultants 			opportunities arise with non-mentorship registered companies	
Sponsorships	Choose an item. Other type:	<ul style="list-style-type: none"> • Program funding • Finance and Operations Manager • Admin Team 	\$4,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • Increased industry awareness of SafetyDriven – TSCBC • Minimum 10 sponsorships 	
Annual Media and Advertising Plan	Choose an item. Other type:	<ul style="list-style-type: none"> • Program funding • Finance and Operations Manager • Admin Team • SAS Manager • COR Manager • Graphic Design & IT Consultants • Writer and Editor Media and Advertising Consultant 	\$10,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • Raise awareness of SafetyDriven – TSCBC using paid, earned, and owned media • Paid • Digital advertising, paid search <p>Earned</p> <ul style="list-style-type: none"> • Develop and implement public relations plan • Social media engagements, external media amplification (e.g. local news outlets, industry publications) <p>Owned</p> <ul style="list-style-type: none"> • Website promotional content (SafetyDriven landing pages, banners, minimum 30) • Email • Safety eNews, Drivers newsletter, Training and Events newsletter (minimum total of 12) 	

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 <ul style="list-style-type: none"> For medium/long term outcomes, evaluate milestones achieved at the end of <u>this fiscal year</u>
# of certifications*	177	80	50		
# of registrations*	174	111	70		
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	To receive applications from interested employers within the classification units SafetyDriven is responsible for and administer the COR program efficiently
Initiative Goal/ Expectation	SafetyDriven will administer the COR program and review its internal procedures to ensure that the process runs smoothly.

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
Administer COR registrations and certifications	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding COR Team HSA/COR Admin SAS Team Admin Team 	N/A	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> Net new COR registrations (Minimum of 70) Net new COR certifications (Minimum of 50) 	
Maintenance of CRM and e-audit tool	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding COR Team 	\$6,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> New process efficiency reports (incl. avg days to enter into iCOR) 	
	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>.

Avg. # of days to enter the audits in iCOR from the audit date	NA				
% of staff employed to # of certified employers*	31.61	14.04	8.33		
Employer experience survey results (if applicable)					

*# of CP employees / # of certified employers

Workplan Template: Mandate 3.0

Mandate	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)
Objective	To ensure that appropriate COR auditor training is made available to employers
Initiative Goal/ Expectation	SafetyDriven will develop training in health and safety management or ensure such training is available to employers through a third party

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</i>	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output

	<i>align with info from your budget template)</i>					
Training of auditors (Internal)	Choose an item. Other type:	<ul style="list-style-type: none"> • Program funding • COR Team • HSA/COR Admin 	N/A	Q1 to Q4 (Ongoing)	<u>Internal Auditors</u> <ul style="list-style-type: none"> • Large: <ul style="list-style-type: none"> • New (Minimum 30) • Recertified (All required) • Small: <ul style="list-style-type: none"> • New (Minimum 40) • Recertified (All required) 	
Educate and communicate safety topics to industry	Choose an item. Other type:	<ul style="list-style-type: none"> • Program funding • Finance and Operations Manager • Admin Team • COR Team • SAS Team 	\$30,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • SafetyDriven – TSCBC hosted health and safety seminar (1.5) 	
Marketing/ Safety content development	Choose an item. Other type:	<ul style="list-style-type: none"> • Program funding • Finance and Operations Manager • Admin Team • COR Team • SAS Team • Graphic Design & IT Consultants • Writer and Editor 	\$6,000	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> • Videos, images, stories, posters, handouts, etc. (minimum 30 assets) 	

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 Internal Auditors Trained for the First Time (Initial) - Large Employers*	32	35	30		
# of Internal Auditors Recertified - Large Employers*	6	14	42		
# of Internal Auditors Trained for the First Time (Initial) - Small Employers*	144	65	40		
# of Internal Auditors Recertified - Small Employers*	44	71	15		
# 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	To ensure that appropriate COR auditor training is made available to external auditors
Initiative Goal/ Expectation	SafetyDriven will develop training in or ensure such training is available to external auditors through a third party

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
Training of auditors (External)	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding COR Team HSA/COR Admin 	N/A	Q1 to Q4 (Ongoing)	<u>External Auditors</u> <ul style="list-style-type: none"> New (0) Recertified (All required) 	
	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 this fiscal year
# of CPIVAs* for Auditor Quality Assurance	3	5	4		
# of CPIVAs as a percentage of total external auditors (S&G Requirement: 10%)	17%	28%	22%		

# of External Auditors Recertified**	18	18	18		
# of external auditors trained for the first time (Initial) (if applicable)**	0	0	0		
# 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	To confirm that employers seeking COR certification are registered with WorkSafeBC, have completed training, and have successfully completed a health and safety management audit.
Initiative Goal/ Expectation	SafetyDriven will perform detailed review of all COR audits, ensuring that audit process deficiencies are remedied as required.

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
Complete all audit quality assurance reviews	Choose an item. Other type:	<ul style="list-style-type: none"> Program funding COR Team HSA/COR Admin External Auditors 	N/A	Q1 to Q4 (Ongoing)	<ul style="list-style-type: none"> All required WIVAs completed (As directed by WorkSafeBC) All required CPIVAs completed (Minimum 4) Quality assurance on all employer audits completed 	
	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
# of WIVAs	3	1	3		<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 as a percentage of total employers					
# of Employers with corrective findings resulting from a WIVA being actioned					

Workplan Template: Mandate 6.0 (Optional)

WorkSafeBC Management Comments

Board Chair Approval

<p>Matthew May</p> <hr/>	<p>DocuSigned by: <i>Matthew May</i></p> <hr/> <p><small>809G2DF70E11495...</small></p>	<p>9/8/2023</p> <hr/>
Name	Signature	Date