

# WORKPLAN TEMPLATE & GUIDELINES

In an effort to ensure fairness and foster consistency in the ongoing evaluation of our COR providers, we have included some direction and guidelines to assist in the completion of this document. The Agreement defines a Work Plan as "...the COR Provider's plan for its operations as a Certifying Partner ... which identifies the COR Provider's objectives, how it plans to achieve its objectives, and includes detailed information on resources, finances, and KPIs."

This document may 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 objective(s) and action plan(s) for each of the five pre-populated COR Provider mandates, you have the option to add more objectives and action plans, if applicable.

<b>Mandate:</b>	<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>
<b>Objective:</b>	<i>The objectives should relate directly to the mandates selected from the Standards and Guidelines and Agreements (above).</i>
<b>Action Plan:</b>	<i>Outline the plan to achieve the objectives and include detailed information on resources, finances, and KPIs.</i>

Work Plans are based on the following mandates:

1. Plan and implement a coherent communications strategy to promote the COR Program. *Reference: S&G 1.2 and Agreement 2(c)ii*
2. Facilitate the registration and certification of employers. *Reference: S&G 1.3 & Agreement 2(c)iii*
3. Help employers meet their needs for COR Program related training and qualified internal auditors. *Reference: S&G 1.4 & Agreement 2.(c)(iv)*
4. Ensure the provision of auditor training and availability of external auditors. *Reference: S&G 1.10 & Agreement 2.(c)(iv)&(x)*
5. Provide verification and quality assurance oversight *Reference: S&G 1.11 & Agreement 2(c)(xi)*
6. Other (optional)

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<b>Mandate #1:</b>	Plan and implement a coherent communications strategy to promote the COR Program. <i>Reference: S&amp;G 1.2 and Agreement 2.(c)(ii)</i>
<b>Objective:</b>	Develop & Implement Digital BC Marketing/Outreach Plan
<b>Action Plan:</b>	<ul style="list-style-type: none"> <li>a. Provide communications on key messages to stakeholders both in the COR program currently and those that are potential COR holders.</li> <li>b. Intend to develop key messages to reach stakeholders as it relates to the COR program.</li> </ul>

### OUTCOME #1 Action Plan details

Activity	Inputs	Budget	Time Frame	Responsible	Anticipated Outputs (KPIs)	Progress Reporting
Develop key messages for digital ad copy	create applicable messages for ad copy. Messages should support information related to the COR program and auditing		6 weeks Jan 1 - Feb 15	Manager / Communications Department	Key messages ready with outline of content for Communications department to work on.	Digital Copy and webpage hits.
Implement digital Marketing activities	Social Media channels. Standalone webpage for link direction	\$8,069	As per schedule with publication	Energy Safety Canada's Communications Department	Reach potential new business to share ESC services	Annual reporting
Develop Annual communication plan for existing COR Holders	Identify standard topics and new topics to develop		As per plan schedule	SA&C Coordinator and Manager	Reach current COR holders to provide information on resources and COR related information	Annual reporting

## WORKPLAN TEMPLATE

<b>OUTCOME #1 WORKPLAN Measurement (Evaluation)</b>			
<b>Outcome Indicators (e.g. KPIs)</b>	<b>Data Collection</b>	<b>Time Lines</b>	<b>Evaluation Results</b>
Current and potential COR holders are more informed of ESC resources and information.	Approximately 1500 stakeholders reached with a frequency of 6 times yearly	As per communication plan scheduling	100% of expectation (1500 stakeholders reached) was achieved
Stakeholders without COR are more aware of benefits of COR program for Oil and Gas industry	Approximately 53,000 stakeholders reached with a frequency of 6 times yearly	As per publication scheduling	100% of expectation (53,166 stakeholders reached) was achieved

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<b>Mandate #2:</b>	Facilitate the registration and certification of employers. <i>Reference: S&amp;G 1.3 &amp; Agreement 2.(c)(iii)</i>
<b>Objective:</b>	<b>Deliver the Certificate of Recognition (COR) Program</b>
<b>Action Plan:</b>	<b>Develop annual Goals &amp; Objectives based on ESC Strategy Articulation Map (SAM) that encompasses activities for the delivery of the COR Program.</b>

### OUTCOME #2 Action Plan details

Activity	Inputs	Budget	Time Frame	Responsible	Anticipated Outputs (KPIs)	Progress Reporting
Implement the 2023 Goals & Objectives plan	Quarterly Stewardship meetings to monitor progress	As per budget	Q1 - Q4	Manager	As per plan	Annual Goals & Objectives plan

### OUTCOME #2 WORKPLAN Measurement (Evaluation)

Outcome Indicators (e.g. KPIs)	Data Collection	Time Lines	Evaluation Results
Delivery of 2023 COR Annual Goals & Objectives plan	+/-5% meeting expectations	Q1 - Q4	Q4 reporting of annual Goals & Objectives plan meets expectations

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<b>Mandate #3:</b>	Help employers meet their needs for COR-related training and qualified <u>internal</u> auditors. <i>Reference: S&amp;G 1.4 &amp; Agreement 2.(c)(iv)</i>
<b>Objective:</b>	<b>Deliver high quality training programs &amp; service</b>
<b>Action Plan:</b>	<b>Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this.</b>

<b>Mandate #4:</b>	Ensure the provision of auditor training and availability of <u>external</u> auditors. <i>Reference: S&amp;G 1.10 &amp; Agreement 2.(c)(iv)&amp;(x)</i>
<b>Objective:</b>	<b>Deliver high quality training programs &amp; service</b>
<b>Action Plan:</b>	<b>Delivery of Auditor training is managed by the ESC Training Delivery Department and the funding requested for COR does not include this.</b>

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<b>Mandate #5:</b>	Provide verification and quality assurance oversight. <i>Reference: S&amp;G 1.11 &amp; Agreement 2.(c)(xi)</i>
<b>Objective:</b>	Quality Assurance (Employer and Auditor)
<b>Action Plan:</b>	<ol style="list-style-type: none"> <li>a. Conduct WIVA audits, as assigned by WSBC</li> <li>b. Conduct On-site Audit Reviews (OSAR)s</li> <li>c. Communicate results and follow-up through the Auditor Performance Management program if required.</li> </ol>

### OUTCOME #5 Action Plan details

Activity	Inputs	Budget	Time Frame	Responsible	Anticipated Outputs (KPIs)	Progress Reporting
Plan necessary OSARs as per developed procedure.	Review audits conducted in BC and select those to OSAR based on procedure.		January - October	Quality Assurance Staff	A schedule of OSARs to conduct	Schedule updates tracking progress made.
Plan WIVAs as requested by WSBC.	Receive list of employers from WSBC and plan WIVA audits.		January - October	Quality Assurance Staff	A schedule of WIVAs to complete	Final report for WSBC to be submitted with annual funding.  Will notify WSBC of any major deficiencies.
Conduct OSARs and WIVAs.	Conduct OSARs and WIVAs as scheduled.	\$30,000	April - December	Quality Assurance Staff & Contracted External Auditors	Data of findings to develop into a report of findings.	Final report for WSBC to be submitted with annual funding.  Will notify WSBC of any major deficiencies.
Develop reports and share findings,	Report findings are summarized in a report		April - December	Quality Assurance Staff & Contracted		Final report for WSBC to be submitted

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as required.	for the specific WIVA and OSAR completed.			External Auditors		with annual funding.
Follow-up with employer and auditors, if required.	Findings summary report analyzed.		April - December	Quality Assurance Staff	Performance management program implemented for major deficiencies and employer assistance.	Final report for WSBC to be submitted with annual funding.

### OUTCOME #5 WORKPLAN Measurement (Evaluation)

Outcome Indicators (e.g. KPIs)	Data Collection	Time Lines	Evaluation Results
Auditors received in-depth feedback on their on-site audit activities.	OSAR and WIVA audit results.	April - December	Auditor re-training or disciplinary action required based on results of conducting 100% of scheduled OSARs and WIVAs.
Employers receive feedback on their past audit findings and additional information as requested by WSBC.	OSAR and WIVA audit results.	April - December	Employer engagement to address deficiencies identified based on results of conducting 100% of scheduled OSARs and WIVAs.
Energy Safety Canada receives quality assurance data from on-site audit reviews and WIVA to assess auditors' performance.	OSAR and WIVA audit results.	April - December	Based on results of conducting 100% of scheduled OSARs and WIVAs, Energy Safety Canada can develop workplan for workshops for the following year.

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### Approval

The signature(s) below signify the approval of the Work Plans based on the five mandates extrapolated from The Certificate of Recognition Program - Standards and Guidelines (January 2011) and annually signed Agreements.

Approved by Association Board Chair:

*Steve Reynish*

\_\_\_\_\_  
(Signature)

Steve Reynish

(Print name)

Date Approved:

12/1/2022 | 12:09:17 PM MST  
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### OPTIONAL

<b>Objective:</b>	Provide 4 presentations or info Sessions
<b>Action Plan:</b>	Develop and provide presentations or info sessions critical audit or COR Program topics. Assess and develop new material.

<b>OUTCOME #      Action Plan details</b>						
<b>Activity</b>	<b>Inputs</b>	<b>Budget</b>	<b>Time Frame</b>	<b>Responsible</b>	<b>Anticipated Outputs (KPIs)</b>	<b>Progress Reporting</b>
Needs assessment & Develop material	<p>Develop and communicate survey to stakeholders to assess needs.</p> <p>Assess Survey results and short list topics</p> <p>Determine new material to be developed and implement development plan</p>		<p>6 weeks:</p> <p>April 1 - May 15</p>	Program Manager	Revised and new information is ready to be communicated	ESC Project management Process
Develop and implement a communication plan to targeted Stakeholders	Provide sessions on new topics to stakeholders	1,000	<p>Over 6 months:</p> <p>July - Dec</p>	Quality Assurance Staff & Program Manager	Info sessions held or presentations communicated	<p>ESC Project management Process</p> <p>Follow-up Surveys</p>

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<b>OUTCOME #      WORKPLAN Measurement (Evaluation)</b>			
<b>Outcome Indicators (e.g. KPIs)</b>	<b>Data Collection</b>	<b>Time Lines</b>	<b>Evaluation Results</b>
Key topic areas are explained in a learning environment	80% improved understanding of key topic areas	July - Dec	100% of expectation (4 presentations, or info sessions completed) was achieved.  Employers are ready for 2023 audits of their system with enhanced learning of key topic areas

**Approval**

Approved by Association Board Chair:

*Steve Reynish*\_\_\_\_\_  
(Signature)

Steve Reynish

\_\_\_\_\_  
(Print name)

Date Approved:

12/1/2022 | 12:09:17 PM MST

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