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

CP Name	go2HR
Year of Workplan	24-25

CP Vision *(if not applicable type N/A)*
Our purpose is to drive strong workforces and safe workplaces that deliver world-class tourism and hospitality experiences in BC

CP Mission *(if not applicable type N/A)*
Our mission is to empower employers to have a strong human resource and health & safety culture that supports strong business performance. *- We offer programs, tools, information, and consulting services to elevate employers' human resources and health and safety practices* *- We educate and train the current and future workforces* *- We inform government, stakeholders and communities on labour market conditions and strategy*

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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:	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.
Objective/Initiative:	The objectives should relate directly to the mandates selected from the Standards and Guidelines and Agreements (above).
Activities:	Outline the plan to achieve the objectives/initiatives and include detailed information on resources, finances, and KPIs.

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 operationalize a marketing strategy to promote the COR program and attract program participants*	**Increase COR program participation through targeted outreach efforts and communication channels**	2024-25	Visits to COR landing page (2,500) Eblasts/newsletter content on general health and safety topics achieve open rate above the industry baseline standard of 15% (12) COR employer showcase (6) Quarterly review of contact information to ensure that outreach opportunities are maximized and that we are effective in reaching our target audience Social media calendar in place; posts as per calendar

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| | | | | Targeted outreach campaigns to promote COR to specific audiences (6)

Requests for 1:1 COR advisory services/ consultations (20)

Sponsorship and award opportunities |
|---|---|---|---|---|
| 2 | *Maintain and continually improve the quality of the COR program, through adherence to internal processes* | **Drive continual improvement of the COR program, identify opportunities for improvement and engage stakeholders in consultation efforts** | 2024-25 | Maintenance of COR database with accurate employer records

Periodic review of website content to make sure it is up to date

COR experience survey with positive qualitative data (1)

Strong registration to certification conversion

Health and Safety Orientation training completions (600)

Occupational Health and Safety Program Fundamentals course completions (175)

Safety Basics Assessment Tool completions (75) |

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				Gap analysis offered to all newly registered employers (18)

New COR registrations (18)

New COR certifications (7)

Tools and resources checked periodically and maintained up to date

Eblasts to existing COR employers with relevant timely information (6) |
| 3 | *Support the ongoing training, development and certification of internal auditors* | **Provide relevant and timely support, resources and training for internal auditors to support their growth and development** | 2024-25 | New internal auditors attended COR internal auditor training session (30 students)

COR internal auditor training sessions: based on demand and class size (3)

Active, trained COR internal auditors (certified/recertified) (75)

Internal auditor declarations: all active auditors

Continuing professional development is reported annually prior to conducting audits |

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				Internal auditors participate in continuing professional development opportunities to enhance their auditing capabilities Occupational Health and Safety Program Fundamentals course enrolments (175) Health and safety orientation training course enrolments (600) Joint health and safety committee training course enrolments (250)
4	*Maintain an adequate number of trained and certified/qualified external auditors to meet demand*	**Maintain external auditor roster and provide refresher training to support continuing professional development**	2024-25	External auditor training is scheduled as needed External auditor annual declarations (9) Continuing professional development is reported annually (external auditor declarations) Update session provided for external auditors during the year (1) Survey carried out to obtain feedback from employers regarding

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				external auditor experience (after each external audit)
5	*Ensure that the quality and integrity of the COR program is maintained by providing effective verification and quality assurance of all audits*	**Provide verification and oversight through CPIVA (EAQA), WIVA and QA activities in order to maintain integrity of the COR program**	2024-25	Desktop quality assurance (100% of all audits) CPIVA / EAQA (10% of external auditors) WIVAs completed as directed (2) All audits reviewed and approved prior to being released QA checklists completed for all audits (100%) H&S advisory committee meetings (4)
6	*Support COR program renewal according to direction provided by WorkSafeBC*	**Plan for and implement future state changes to support COR program renewal efforts**	According to WorkSafeBC timelines	To be determined
7	*Support continual improvement efforts of COR employers by raising the profile of emerging workplace health and safety topics*	**Examine the viability of a psychological health and safety audit framework to support continual improvement efforts of COR certified employers**	2024-25	Research carried out on the topic of psychological health and safety auditing approaches Audit framework developed

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 operationalize a marketing strategy to promote the COR program and attract program participants*
Initiative	*Increase COR program participation through targeted outreach efforts and communication channels*
Initiative Goal/ Expectation	*There will be an increase in awareness about the benefits of the COR program and growing numbers enquiries, subsequent registrations and eventual certifications*

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 (Note: this should align with info from your budget template)	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Increase general awareness of the COR program through communications activities and go2HR's regional presence	Marketing/ Outreach Other type: research	Staff		April 24 – March 25	Communications plan is executed, highlighting social media activities, regular newsletters, eblasts and articles in partner publications Regional HR Consultants are sharing introductory information about the COR program to interested	

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					parties and sending referrals to COR team for follow up	
Participate in and sponsor industry events, awards & conferences to raise awareness about the COR program	Marketing/ Outreach Other type:	Staff, industry associations and partners	$16000	**April 24 – March 25**	Requests for follow up information from attendees Raise awareness of COR program and health and safety supports for employers Increased interest and visibility of the COR program among different industry sectors	
Plan and execute a targeted COR registration drive	Marketing/ Outreach Other type: research	Staff, consultants, graphic designers	$6000	**April 24 – March 25**	WorkSafeBC data is analyzed and segmented, to identify suitable COR candidates based on payroll and experience rating (hotels, cleaning companies, restaurant chains, ski resorts and unserved CUs) and facilitate direct employer outreach Targeted materials are developed to attract employers to the COR program Direct employer engagement leads to conversion- an increase in COR registrations from interested companies	
Active engagement through advisory services and coaching supports advancement towards COR certification	Marketing/ Outreach Other type: research	Staff	$4500	**April 24 – March 25**	Coaching sessions and site visits support employers in advancing their programs towards COR readiness Personalized service and regular check-ins help to	

					keep employers engaged and moving forward There is a growing number of COR registered employers and a growing conversion rate from registration to certification, through active engagement in the COR program	

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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)	22/23 FY Actuals	23/24 FY Estimate	24/25 FY Forecast	Year End Results	Evaluate Outcomes Achieved • For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of certifications*	8	5	7		
# of registrations*	12	15	18		

*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	*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)*
Objective	*Maintain and continually improve the quality of the COR program, through adherence to internal processes*
Initiative	*Drive continual improvement of the COR program, identify opportunities for improvement and engage stakeholders in consultation efforts*
Initiative Goal/ Expectation	*Maximize efficiencies and offer a high-quality 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 (Note: this should align with info from your budget template)	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Maintain service levels, provide exceptional customer service and provide reliable information to all COR program participants	Marketing/Out reach Other type:	Staff		**April 24 – March 25**	Support employers through targeted, introductory advisory services, using the "contact us" form, 1:1 meetings, phone and email Schedule timely and relevant communications with COR employers about	

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					important news and changes and reminders about upcoming audits Review and act upon all feedback received to facilitate continual improvement efforts	
Maintain, develop and enhance COR program offerings, including support materials and website content	Program Development Other type:	Staff, graphic designers, consultants,	$8000	**April 24 – March 25**	Periodic QA review and update of COR program materials and website content is conducted and updates made Additional support materials are developed, as required, including infographics, checklists and other audit aids	
Offer gap analysis service to all COR employers registered in the program to support advancement towards certification	Program Development Other type:	Staff	$4500	**April 24 – March 25**	Gap analysis documentation is reviewed and updated periodically Employers are able to request a formal gap analysis or can opt to do a self-assessment, ensuring a flexible and tailored approach to this service Gap analysis service is offered to all new program registrants, providing personalized support for employers seeking to become certified Employers are given a targeted action plan and are able make	

					improvements that prepare them for a successful COR certification audit	
Support COR employer continual improvement efforts by providing a Corrective Action Plan review service	Program Development Other type:	Staff		**April 24 – March 25**	Corrective action plans are submitted to go2HR after each audit for detailed review and feedback COR employers receive a personalized report with targeted resources and suggestions that help to address their action items	
Maintain Customer Relationship Marketing (CRM) and COR employer spreadsheet Explore potential COR administration workflow efficiencies and improvements	Program Development Other type:	Staff, maintenance of technology/ subscription	$6000	**April 24 – March 25**	Use CRM data to create and maintain updated COR communications lists to facilitate effective timely communications efforts Utilize other CRM functions to support administration workflow improvements, including the programming of audit reminders Maintain accurate COR employer lifecycle information on spreadsheet	
Solicit feedback from COR employers to support continual improvement efforts	Program Development Other type:	Staff	$1000	**April 24 – March 25**	An annual COR satisfaction survey is developed and distributed to all COR employers Qualitative data collected on the COR	

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					program provides opportunities to gather employer insight, implement program improvements and gauge overall satisfaction levels, which support enhanced program offerings Feedback helps to drive longer term program enhancement and will be factored into future workplans, supporting COR employer satisfaction and retention	
Engage with and solicit feedback from Health and Safety Advisory Committee through quarterly meetings	Program Development Other type:	Staff, employers, industry partners and stakeholders	$1000	**April 24 – March 25**	Meetings are facilitated and meeting notes captured Committee insight is factored into future work activities	
Provide continuing professional development opportunities for COR team to support high quality program delivery and subject matter expertise	Program Development Other type:	Staff	$3000	**April 24 – March 25**	Staff professional development, as per individual performance plans	

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)	**22/23 FY Actuals**	**23/24 FY Estimate**	**24/25 FY Forecast**	**Year End Results**	**Evaluate Outcomes Achieved** • For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
Responses from employer COR satisfaction survey	0	15	20		
Corrective action plans reviewed	0	15	20		

*# of CP employees / # of certified employer

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	*Support the ongoing training, development and certification of internal auditors*
Initiative	*Provide relevant and timely support, resources and training for internal auditors to support their growth and development*
Initiative Goal/ Expectation	*Internal auditors will have easy access to industry specific training* *There will be an increase in newly certified/qualified internal auditors* *Existing internal auditors will retain their certification/qualification*

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** *(Note: this should align with info from your budget template)*	**Inputs**	**Budget**	**Time Frame/ Completion Date**	**Anticipated Output**	**Actual Output**
Plan for and facilitate regular COR internal auditor training	Auditor Training Other type:	Staff		**April 24-March 25**	COR internal auditor training information is maintained on website to facilitate easy registration Waitlist function is active to enable prospective	

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					students to register their interest and be contacted when the next training date is announced Upcoming COR internal auditor training sessions are promoted by eblast and individual communication to encourage high participation rates Internal auditor training sessions are facilitated and 1:1 sessions are held with each student to help prepare them for their upcoming student audits	
Maintain accurate list of certified internal auditors, tracking professional development	Auditor Training Other type:	Staff			**April 24 – March 25**	Internal auditor status information and auditing files are maintained to show participation in audits and continuing professional development Continuing professional development of internal auditors is tracked, reminders are sent, as needed, and training opportunities are shared to help them meet their ongoing training requirements COR audit resources are maintained and updated to support internal auditors in preparing for and conducting audits	

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					Regular communication is sent to internal auditors to help them plan for upcoming audits and to offer support Positive relationships with internal auditors are maintained as a result of the ongoing contact and support being offered, leading to higher retention levels of certified internal auditors	
Conduct quality assurance and support continual improvement of internal auditor training	Auditor Training Other type:	Staff		**April 24-March 25**	COR internal auditor training program content is maintained up to date through regular review and customization prior to each training session, according to the audience Internal auditor training survey is sent to students after each training session and the feedback is reviewed and acted upon Internal team debrief after each training session provides an opportunity to critique the last session and brainstorm ideas for the next, to support continual improvement	
Offer health and safety training and education options for COR	Auditor Training	Staff, LMS user fees	$25000	**April 24-March 25**	LMS is maintained to facilitate participation in	

| participants through go2HR's Learning Management System (LMS) | Other type: | | | | training by providing access to courses

Relevant training opportunities are offered and enrolments monitored, including:

- COR internal auditor prerequisite training course

- Occupational Health and Safety Program Fundamentals course

- Health and safety orientation course

- Joint Health and Safety Committee training course

- Two new courses to be added to health and safety training portfolio in 24/25

COR employers are better prepared to develop their programs, train their staff and understand the COR program elements that support a strong occupational health and safety management system

Internal auditors are able to meet their continuing professional development requirements through | |
|---|---|---|---|---|---|---|

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					access to go2HR's training offerings

Overall training participation rates are increasing | |
| Maintain and promote training course offerings, customer service and quality assurance activities | Auditor Training Other type: | Staff, consultant | $4000 | **April 24- March 25** | Training course content is reviewed and updated as needed, to reflect new information and regulatory changes

Ease of course enrolment and course navigation is monitored to encourage course participation

Use COR contact lists to share information about training courses and encourage registrations by eblast, newsletter and individual communication

Offer prompt and reliable customer service support to all participants through email and phone and troubleshoot any challenges

Performance metrics are monitored for course enrolment rates and participant feedback is acted upon | |

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)	**22/23 FY Actuals**	**23/24 FY Estimate**	**24/25 FY Forecast**	**Year End Results**	**Evaluate Outcomes Achieved** • For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of Internal Auditors Trained for the First Time (Initial) - Large Employers*	38	28	30		
# of Internal Auditors Recertified - Large Employers*	61	28	75		
# of Internal Auditors Trained for the First Time (Initial) - Small Employers*	1	1	1		
# of Internal Auditors Recertified - Small Employers*	3	3	3		
# of internal auditor training courses offered	4	3	3		

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

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Workplan Template: Mandate 4.0

Mandate	*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)*
Objective	*Maintain an adequate number of trained and certified/qualified external auditors to meet demand*
Initiative	*Maintain external auditor roster and provide refresher training to support continuing professional development*
Initiative Goal/ Expectation	*Current roster of external auditors is maintained and access to current COR materials is provided* *Ongoing training and professional development requirements are met by all external auditors*

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 *(Note: this should align with info from your budget template)*	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Maintain roster of certified external auditors, tracking professional development	Auditor Training Other type:	Staff		**April 24– March 25**	The roster of external auditors is sufficient to meet the current and future demands of COR employers Professional development opportunities are provided and communicated to	

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					external auditors (webinars, training) External auditors submit annual declarations to confirm continuing professional development and participation in audits External auditor files are kept up to date to reflect active auditors 100% retention of external auditors achieved	
Provide training and updates and access to auditing support documents to facilitate COR audits	Auditor Training Other type:	Staff			**April 24 – March 25**	COR audit resources are maintained and updated to support external auditors in preparing for and conducting audits Regular updates are provided to external auditors regarding any changes to the COR program and supporting documentation Annual external auditor refresher training provides information on program changes and updates Positive relationships are maintained as a result of the ongoing contact and support being offered, leading to higher retention levels of certified external auditors	

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| Solicit feedback on external auditors from COR employers | Auditor QA Other type: | Staff | | April 24- March 25 | Survey sent to all COR employers who have received an external (certification or recertification) audit to request feedback about the auditing experience

Survey information provides insight into employer's experience with the external auditor they selected for the audit

Opportunities for improvement are considered and feedback is shared, as appropriate

Quality assurance activities support continual improvement and consistency between auditors | |

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)	**22/23 FY Actuals**	**23/24 FY Estimate**	**24/25 FY 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	1	1	1		
# of CPIVAs as a percentage of total external auditors *(S&G Requirement: 10%)*	11%	11%	11%		
# of External Auditors Recertified**	9	9	9		
# of external auditors trained for the first time (Initial) *(if applicable)**	0	0	0		
% of External Auditors that did not Recertify of total external auditors***	10%	0%	0%		

* 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	*Ensure that the quality and integrity of the COR program is maintained by providing effective verification and quality assurance of all audits*
Initiative	*Provide verification and oversight through CPIVA (EAQA), WIVA and QA activities in order to maintain integrity of the COR program*
Initiative Goal/ Expectation	*All audits are verified through robust quality assurance process* *WIVAs are completed as requested by WorkSafeBC*

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 *(Note: this should align with info from your budget template)*	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Conduct desktop Quality Assurance (QA) for all audits	Desktop QA Other type:	Staff, consultants/QA reviewers	$13000	**April 24– March 25**	Desktop quality assurance is completed on each audit to ensure it meets the required standard Quality assurance checklist is completed	

					for each audit that undergoes QA Consistency is applied to all audits through the QA process to ensure intent of each audit question is met All audits are verified prior to being approved for release by certifying partner All audit documentation is filed and securely stored Customer service and communication standards between certifying partner, auditor(s) and COR employer are maintained and expectations regarding the process and turnaround times are met	
Conduct Certifying Partner Initiated Verification Audit (CPIVA)	Auditor QA Other type:	Staff			**April 24 – March 25**	10% of external auditor pool is audited to verify audit data that was collected and obtain feedback on performance by COR employer Verification audit is completed and feedback is provided to the external auditor, as required	

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					Report is saved in external auditor file for future reference and activity is tracked on COR spreadsheet	
WorkSafeBC initiated verification audit (WIVA)	Employer Audit QA (WIVA) Other type:	Staff, external auditor	$15000	**April 24- March 25**	2 current COR employer accounts receive a WIVA WIVA is conducted, as directed by WorkSafeBC QA review of all audit documentation WIVA results form completed and submitted to WorkSafeBC for approval	

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)	22/23 FY Actuals	23/24 FY Estimate	24/25 FY 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	1 account	2 accounts	2 accounts		
# of WIVAs as a percentage of total employers	-	-	2/75 projected = 2.66%*		

*Please note: WIVAs for 24/25 have been budgeted as per previous year, based on two accounts being selected (budget for 24/25 was submitted in March '23). In future years, the new calculation will be considered when forecasting the number of WIVAs.

Workplan Template: Mandate 6.0 (Optional)

Mandate	*Other*
Objective	*Support COR program renewal according to direction provided by WorkSafeBC*
Initiative	*Plan for and implement future state changes to support COR program renewal efforts*
Initiative Goal/ Expectation	*To support the transition process, as directed by WorkSafeBC, with minimal disruption to COR employers* *Potential action plan details are outlined below and subject to change, according to direction provided by WorkSafeBC*

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 *(Note: this should align with info from your budget template)*	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Support the Partners Program in COR renewal activities	Program Development Other type	Staff		As directed by WorkSafeBC	Participation in Partners Program consultation and meetings Input into new audit standard by certifying partner	

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					Participation in Partners Program training	
Prepare a transitional plan	Program Development Other type	Staff		As directed by WorkSafeBC	Potential impacts of program changes for employers and auditors are identified A transitional project plan, identifying objectives, timelines and responsibilities is developed Training and support for certifying partner staff involved in COR program is carried out	
Initiate a Technical Advisory Committee of industry representatives	Program Development Other type	Staff, stakeholders, COR employers		As directed by WorkSafeBC	Potential stakeholders are identified and contacted to confirm their interest Committee documentation, including terms of reference, developed and shared Stakeholders are invited to attend meetings Feedback and input solicited	
Inform all employers of upcoming changes	Marketing/Outreach Other type:	Staff		As directed by WorkSafeBC	Communications schedule developed	

WORK SAFE BC

					Regular communication to COR employers to keep them informed about changes Eblasts/direct emails sent to COR employers	
Update all documentation relating to audit change: Audit Tool, Scorecard, Policies and Procedures manual	Program Development Other type:	Staff		As directed by WorkSafeBC	New audit tool is developed Policies and procedures and support documents are updated and published New audit tool is launched	
Guide and support all COR employers through change	Program Development Other type:	Staff		To be determined	Support offered to employers to facilitate program change 1:1 consultation, email and information sessions are created and provided to employers to support the transition 100% COR employer retention achieved	
Update all training materials for external auditor training	Program Development Other type:	Staff		To be determined	Materials to support training of	

WORK SAFE BC

					external auditors are developed	
Train external auditors on new COR	Auditor Training Other type:	Staff, consultants		To be determined	A training plan is developed to facilitate the training of external auditors on new audit standard 100% external auditor retention	

WORK SAFE BC

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)	**22/23 FY Actuals**	**23/24 FY Estimate**	**24/25 FY Forecast**	**Year End Results**	**Evaluate Outcomes Achieved** • For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of COR certified employers	63	68	75		
% of existing COR employers retained	93.22%	100%	100%		
External auditors retained	9	9	9		

Workplan Template: Mandate 7.0 (Optional)

Mandate	*Other*
Objective	*Support continual improvement efforts of COR employers by raising the profile of emerging workplace health and safety topics*
Initiative	*Examine the viability of a psychological health and safety audit framework to support continual improvement efforts of COR certified employers*
Initiative Goal/ Expectation	*Viability work will be completed* *go2HR will be able to provide added value to COR employers by offering psychological health and safety related audit questions and targeted support from go2HR's Psychological Health and Safety Coaches*

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 (Note: this should align with info from your budget template)	Inputs	Budget	Time Frame/ Completion Date	Anticipated Output	Actual Output
Conduct stakeholder engagement activities and preliminary research into viability of psychological health and safety as an additional, optional component of the COR audit	Program Development Other type:	Staff		**April 24 – March 25**	Input solicited from stakeholders Research carried out Environmental scan conducted to assess currently available	

WORK SAFE BC

					audit options and their suitability Data analysis helps shape the formation of the project	
Develop a psychological health and safety audit component framework with support from PH&S Coaches and Canadian Mental Health Association (CMHA) colleagues	Program Development Other type:	Staff			April 24 – March 25	Design questions Include input from PH&S coaches and CMHA Framework created and ready for testing	
Pilot the psychological health and safety audit framework with employers	Program Development Other type:	Staff			April 24 – March 25	Employers pilot the audit framework Data from employers gathered to draw conclusions and determine viability Key learnings from pilot shared with other stakeholders	

WORK SAFE BC

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)	**22/23 FY Actuals**	**23/24 FY Estimate**	**24/25 FY Forecast**	**Year End Results**	**Evaluate Outcomes Achieved** • For medium/long term outcomes, evaluate milestones achieved at the end of this fiscal year
# of COR employers opting in to the pilot	N/A	N/A	5		
# of COR employers requesting support from psychological health and safety coaches	N/A	N/A	5		

WorkSafeBC Management Comments

Board Chair Approval

Craig Blize

_____

Name

_____

Signature

September 22, 2023

_____

Date

CP Initiatives Workplan Template (May 2023)

SCHEDULE C
PRIVACY PROTECTION SCHEDULE

Definitions

1.   In the Agreement and this Schedule C:

(a)   "**FIPPA**" means the *Freedom of Information and Protection of Privacy Act* [RSBC 1996] chapter 165, as amended from time to time, and includes any successor or replacement legislation with respect to access to information or privacy;

(b)   "**FIPPA Designate**" means the manager of the WorkSafeBC FIPP Office (fipp@worksafebc.com);

(c)   "**Electronic Metadata**" means metadata generated by an electronic system that describes an individual's interaction with the system;

(d)   "**Personal Information**" means any information about an identifiable individual, other than contact information as defined in FIPPA;

(e)   "**Privacy Commissioner**" means BC's Information and Privacy Commissioner appointed under FIPPA.

FIPPA Application

2.   The Contractor acknowledges that FIPPA, by its terms, applies to the Contractor as a service provider in the same manner as it applies to an employee of WorkSafeBC. The Contractor will comply with the requirements of FIPPA applicable to the Contractor as a service provider; any applicable order or request of the Privacy Commissioner; and reasonable directions given by WorkSafeBC with respect to FIPPA compliance and compliance with WorkSafeBC privacy policies.

3.   Notwithstanding any provision of the Agreement or the laws of any jurisdiction, the law of British Columbia, including but not limited to FIPPA, applies with respect to any matter related to privacy and protection of Personal Information.

4.   The Contractor warrants and represents it is knowledgeable with respect to FIPPA requirements applicable to service providers. The Contractor must ensure the Contractor and the Contractor's employees and permitted subcontractors involved in the performance of the Agreement are trained on FIPPA requirements and the requirements of this Schedule to the extent they differ from or are additional to the Contractor's privacy policies. FIPPA or privacy training must be refreshed at least annually.

Collection of Personal Information

5.   Unless the Agreement otherwise specifies or WorkSafeBC otherwise directs in writing, the Contractor:

(a)   may only collect or create Personal Information that is authorized under the Agreement and necessary for the performance of the Contractor's obligations under the Agreement;

(b)   must, to the extent Personal Information is collected expressly for WorkSafeBC, collect Personal Information directly from the individual the information is about; and

(c)   must, to the extent Personal Information is collected expressly for WorkSafeBC, tell an individual from whom the Contractor collects Personal Information:

(i)   the purpose for collecting it;

(ii)   the legal authority for collecting it; and

(iii)   to contact the FIPPA Designate to answer questions about the Contractor's collection of Personal Information at FIPP@worksafebc.com or (604) 279-8171.

Accuracy of Personal Information

6.   The Contractor must make every reasonable effort to ensure the accuracy and completeness of any Personal Information collected by the Contractor in performing its obligations under the Agreement.

7.   Upon notice from WorkSafeBC, the Contractor will correct Personal Information in its custody in a timely manner to ensure that any Personal Information is accurate, complete and up-to-date as required by FIPPA. The Contractor will advise WorkSafeBC when the correction is completed.

8.   If the Contractor receives a request for correction of Personal Information from a person other than WorkSafeBC, the Contractor must advise the person to make the request to the FIPPA Designate.

Protection of Personal Information

9.   The Contractor must protect Personal Information against unauthorized access, use, disclosure or disposal by making reasonable security arrangements through appropriate administrative, technical, and physical security controls and comply with any requirements with respect to such controls set out in the Agreement, any representations with respect to security made generally on a Contractor website or specifically to WorkSafeBC, and WorkSafeBC policies provided to the Contractor. These requirements are in addition to, and not replacement of, any higher standards required by a professional governing body, privacy certification or laws of a jurisdiction other than British Columbia.

10. All Personal Information must be encrypted in transit and at rest using industry accepted standards, strong encryption techniques, and current security protocols.

11. Where the Contractor or a permitted subcontractor or subprocessor has or generates Electronic Metadata as a result of the Services, the Contractor or a permitted subprocessor will not use the Electronic Metadata or disclose it, unless information in individually identifiable form is removed from the Electronic Metadata or is destroyed.

12. The provisions of this Schedule apply to Personal Information and metadata that is not Electronic Metadata, including if aggregated and de-identified (all Personal Information is removed and the Personal Information cannot be re-identified) unless specified otherwise in the Agreement.

WorkSafeBC Rights

13. WorkSafeBC has the exclusive right to determine if the Contractor's security arrangements are reasonable security arrangements as required under FIPPA.

14. The Contractor's physical custody of Personal Information, or that of a permitted subcontractor or subprocessor, for the purposes of the Agreement does not equate transfer of control. The rights to access, use, disclosure, destruction and integrity of the Personal Information remain in WorkSafeBC's control.

Data Residency

15. Unless the Agreement specifically provides otherwise, the Contractor must not store or disclose Personal Information outside Canada. This includes ensuring that email servers,

data storage servers, back-up servers and disaster recovery servers are located within Canada.

Access to, use and disclosure of Personal Information

16. The Contractor may only use Personal Information for the performance of the Contractor's obligations under the Agreement and must restrict access to only the Contractor and the employees and contractors (including any subprocessors) where access and use is necessary to carry out the obligations under the Agreement, and only to the extent necessary.

17. The Contractor may only disclose Personal Information to the extent the disclosure is authorized under the Agreement and necessary for the performance of the Contractor's obligations and the exercise of any rights of disclosure as set out in the Agreement.

18. If the Contractor receives a request for access to Personal Information from a third party, including any law enforcement agency or party acting under government authority, the Contractor must immediately contact the FIPPA Designate for instructions and not respond, unless required by law.

Disposition of Personal Information

19. Unless WorkSafeBC requests the return of Personal Information or unless retention is required by law or a professional regulatory body having jurisdiction over the Contractor, the Contractor will securely and irretrievably destroy all Personal Information on the earlier of:

    (a) a request by WorkSafeBC;

    (b) the Personal Information no longer being required for the purposes of the Services; or

    (c) the Agreement ending,

    provided that the Contractor will retain any records that inlcude Personal Information used by the Contractor to make a decision that directly affects the individual whom the Personal Information is about for one year after the decision is made.

20. The Contractor will be entitled to retain the copies of Personal Information in a back-up system in non-readable form or the copies as required by law or a professional regulatory body on the condition that such copies and any Personal Information remains subject to the requirements of this Schedule and are securely and irretrievably destroyed in accordance with the Contractor's usual destruction schedule.

Compliance and Notification Obligations

21. The Contractor must have a privacy management program in place that addresses the collection, access, use, disclosure, storage, retention, security and disposal of Personal Information in compliance with this Schedule, and a privacy breach protocol. The Contractor will provide WorkSafeBC with a copy of its privacy management program upon request, if not otherwise available through an open website link.

22. WorkSafeBC and/or the Privacy Commissioner may, at any reasonable time and on reasonable notice, conduct a review with respect to compliance with this Schedule. The Contractor will cooperate with WorkSafeBC and/or the Privacy Commissioner in a compliance review, and will provide such access, documents and assistance as are reasonably necessary. The Contractor must institute any recommended reasonable changes arising from a compliance review.

23. The Contractor must immediately notify the FIPPA Designate:

(a) of any breach or suspected breach of its obligations related to privacy as set out in the Agreement or this Schedule;

(b) if it anticipates it will be unable to comply with a provision in this Schedule in any respect,

and where requested, co-operate with WorkSafeBC in taking steps to address and/or prevent recurrence of the breach or in addressing the anticipated non-compliance. The Contractor will not notify any third parties whose Personal Information is involved in the breach as a result of the delivery of services to WorkSafeBC without WorkSafeBC's prior agreement, not to be unreasonably withheld.

24. The Contractor agrees to cooperate and assist WorkSafeBC and/or Privacy Commissioner in any investigation of a complaint that Personal Information has been used or disclosed contrary to FIPPA, the Agreement or this Schedule.

25. If the Contractor fails to comply with any requirements set out in this Schedule or any WorkSafeBC directions given under this Schedule, WorkSafeBC will, notwithstanding any provision of the Agreement to the contrary, be entitled to immediately terminate the Agreement without charge or penalty. If the Contractor's failure relates to accuracy and correction of Personal Information, WorkSafeBC's right to terminate will be subject to the Contractor first being given 10 business days to remedy the breach.