



## **Development of the Full-service Model for the Construction Industry Training Organization**

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***Draft Report, June 20, 2008***

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## EXECUTIVE SUMMARY

### OVERVIEW OF THE PROJECT

The Industry Training Authority (ITA) was established in 2004 with a mandate to expand and improve industry training, through the creation of a flexible, accountable and industry-led system. To this end, the ITA has approved a series of Industry Training Organizations (ITOs), which are industry initiated and led organizations that are responsible for improving industry training in a specific sector. To date, 6 ITOs have been established. The operations of an ITO are established through a three-stage process:

- During the *start-up phase*, the ITO establishes its basic organizational structure, hires key staff and opens an office. This has been completed for CITO.
- During the *developmental phase*, the ITO assumes some of the core responsibilities that are part of its mandate and begins to take a lead role in key activities such as developing its annual service plan, consultation, updating program standards, and participating in the development of an annual training plan for the trades included in its mandate.
- In the *full-service delivery stage*, the ITO assumes full responsibility for the services and tasks identified by the ITA.

The Construction Industry Training Organization (CITO) was established by the ITA to provide leadership and active engagement in defining and meeting training needs related to the construction industry. More specifically, CITO will function as the hub of the training system, creating and maintaining a skilled workforce for the largest sector of the construction industry including institutional construction, commercial construction, industrial construction, multi-unit high rise residential construction, bridge and other forms of civil construction.

CITO is currently in the developmental phase. The purpose of this project is to define the operational model that CITO will utilize in the full-service delivery stage. The project has been implemented in five distinct components, including:

- An environmental scan;
- Investigation of the requirements for a full-service ITO;
- Development of communication and consultation strategies to be utilized by CITO;
- Consultations with diverse stakeholders to validate the most viable full-service model; and
- Completion, in collaboration with the Steering Committee, of a validated full-service model for CITO with a cost analysis and an implementation strategy.

The full-service model for CITO is summarized in the following sections in terms of:

- The mandate, vision and key strategic outcomes defined for CITO;
- The training programs for which CITO has been assigned responsibility and the stakeholders that will be served by CITO;
- The key functions that will be fulfilled by CITO and how CITO will deliver those functions;
- The staffing requirements and proposed organizational structure; and
- The projected capital and operating budget.

## CITO's MANDATE, VISION AND KEY STRATEGIC OUTCOMES

The Board of CITO has defined the mandate, vision, values and key strategic outcomes of the organization. The mandate is defined as follows:

*CITO provides industry leadership in training which results in the right number of workers, with the right knowledge and skills, developed to the right standards, and available at the right time and for the right needs.*

The vision is:

*CITO-directed training matches worker competencies with employer needs and contributes to the long-term competitiveness, sustainability and vitality of the BC construction sector.*

In carrying out its mandate and pursuing its vision, CITO foresees achieving these key strategic outcomes:

- A better definition of current and anticipated future training needs within the sector;
- Better sector-wide training coordination and more effective resource allocation;
- Improved alignment between program standards and workforce requirements;
- Improved alignment of training options and pathways with apprentice needs;
- Enhanced recruitment and retention capabilities within the sector; and
- Improved workplace outcomes for apprentices

## OVERVIEW OF THE TRADES AND STAKEHOLDERS SERVED BY CITO

The characteristics of the trades and stakeholders that will be served by CITO include:

- **Under its mandate, CITO is currently responsible for 28 apprenticeship trade programs and 21 foundation programs.** The apprenticeship trade programs include Architectural Sheet Metal Worker, Bricklayer (Mason), Boilermaker, Cabinetmaker (Joiner), Carpenter, Cement Mason, Construction Electrician, Construction Formwork Technician, Domestic/Commercial Gasfitter, Drywall Finisher, Elevator Mechanic, Floor Covering Installer, Glazier, Hardwood Floorlayer, Heat and Frost Insulator, Ironworker, Metal Fabricator (Fitter), Painter and Decorator, Piledriver and Bridgeworker, Plumber, Plasterer, Refrigeration & Air Conditioning Mechanic, Reinforcing Steel Installer, Roofer, Security Alarm Installer, Sheet Metal Worker, Sprinkler System Installer, Tiler, and Wall and Ceiling Installer.
- **CITO will function as the hub of the training system for its trades**, creating and maintaining a skilled workforce for the largest segment of the construction industry including institutional construction, commercial construction, industrial construction, multi-unit high rise residential construction, bridge and other forms of civil construction.
- **As the hub of the training system for the construction industry, CITO will interact with a wide variety of stakeholder groups.** In addition to the ITA and apprentices, CITO will work with employers (there are an estimated 40,000 employers involved in the construction sector of which 8,000 to 9,000 employ construction trade apprentices), a range of employer associations, training organizations (13 public and 11 private training organizations deliver training related to the CITO trades), joint boards, unions, the K-12 educational system, Provincial Government ministries and agencies, Federal Government departments, other ITOs and various other bodies.
- **Training requirements vary widely by trade.** The programs commonly require trainees to

complete 12 to 24 weeks of training in-school although certain trades can be much higher (e.g., the electrician program requires 40 weeks). The technical training content is usually divided into 2 to 4 levels and, while most programs can be completed in 2 to 4 years, trainees have to successfully pass the practical assessments (where required) and written level examinations before he or she proceeds to the next level. Requirements for work-based training vary widely, from 2000 hours (reinforcing steel installer) to 7220 hours (refrigeration and air conditioning mechanic).

- **The trades assigned to CITO account for 60% of the registered apprentices in BC.** According to data reported by ITA, 35,398 trainees were registered in 130 different trade programs as of September 30, 2007. Of these total, 21,183 are registered in the CITO trades. Overall, there are about 140,000 people employed in the construction industry in BC.
- **Four trades account for three-quarters of the apprentices registered in the CITO trades.** Carpenter (28%), electrician (28%), plumber (14%), and sheet metal worker (5%) are the CITO programs with largest numbers of registered apprentices.
- **Of the 29 CITO trade programs, 19 are Red Seal programs.** The credentials of a certified tradesperson who has successfully earned a Red Seal ticket are recognized across Canada. An inter-provincial Red Seal Examination is required for the 19 Red Seal Accredited Programs. The Red Seal programs account for 96% of the 21,183 apprentices registered in the CITO trades.
- **Programs need to be regularly updated to keep current with industry practices and trends.** Of the 29 trades, 10 are currently in the process of being developed or updated, 2 were last updated in the past 3 years, 3 were last updated from 4 to 6 years ago, and 6 were last updated more than 10 years ago. We have no data when the other 8 programs were last updated.
- **Registered apprentices reside in communities throughout British Columbia.** Of the 21,183 apprentices, 52% reside in the Lower Mainland, 18% in the southern interior, 17% on Vancouver Island, and 7% in northern BC. The region of residence for 6% of the total trainees is not known.
- **One-half of the apprentices (51%) in the CITO trades have yet to register for any technical training.** The distribution of apprentices in terms of highest level of training for which he or she has completed include Level 1 (20%), Level 2 (15%), Level 3 (9%), and Level 4 (5%). Of the 10,711 apprentices who have not registered in any training, 65% have registered as apprentices within the past year, 24% registered 1 to 2 years ago, and 11% have been registered for more than 2 years. This suggests that a slowdown in construction activity could result in a significant increase in the number of apprentices enrolled in training programs.

## FUNCTIONS TO UNDERTAKEN BY CITO

The ITA defined 15 services and tasks for which ITOs such as CITO will have responsibility in the full-service delivery stage. These tasks include:

- Recommend program standards for assigned training programs;
- Undertake program development and implementation activities;
- Assist in Red Seal product development;
- Forecast training demand for assigned programs;
- Prepare an annual training purchase plan for assigned programs;
- Conduct activities to increase employer and apprentice/trainee participation;
- Facilitate the review of applications from private training providers for designation;
- Act as a point of contact for employers and apprentices for assigned programs;

- Register apprentices/trainees in conjunction with the ITA;
- Conduct apprentice/trainee assessment;
- Consult with key stakeholders who have an interest in the assigned industry training programs;
- Participate in strategic initiatives;
- Prepare and implement an annual ITO Service Plan;
- Participate in the development of the annual ITA Service Plan; and
- Produce an annual report.

In addition, there will some functions required for the effective operation of the organization (e.g., communication and administrative functions) which were not specifically identified by the ITA.

Many of these tasks and services are inter-related. For example, approving program standards for assigned training programs, undertaking program development and implementation activities, and assisting in Red Seal product development all relate to program development. Similarly, forecasting training demand for assigned programs, conducting activities to increase employer and apprentice/trainee participation, designating training providers, and preparing annual training purchase plans for assigned programs for recommendation to the ITA all have relevance to the planning for and delivery of technical training programs.

The functions to be performed by CITO have been divided into three major categories. As shown in the chart on the following page and discussed below, the three major categories include core service delivery functions, external support functions, and internal support functions.

### ***Core Service Delivery Functions***

The core service delivery functions represent the key activities of the ITO (i.e., the primary functions for which the ITO was created). We have defined the core functions to be program development, planning for training programs, and apprenticeship registration and assessment.

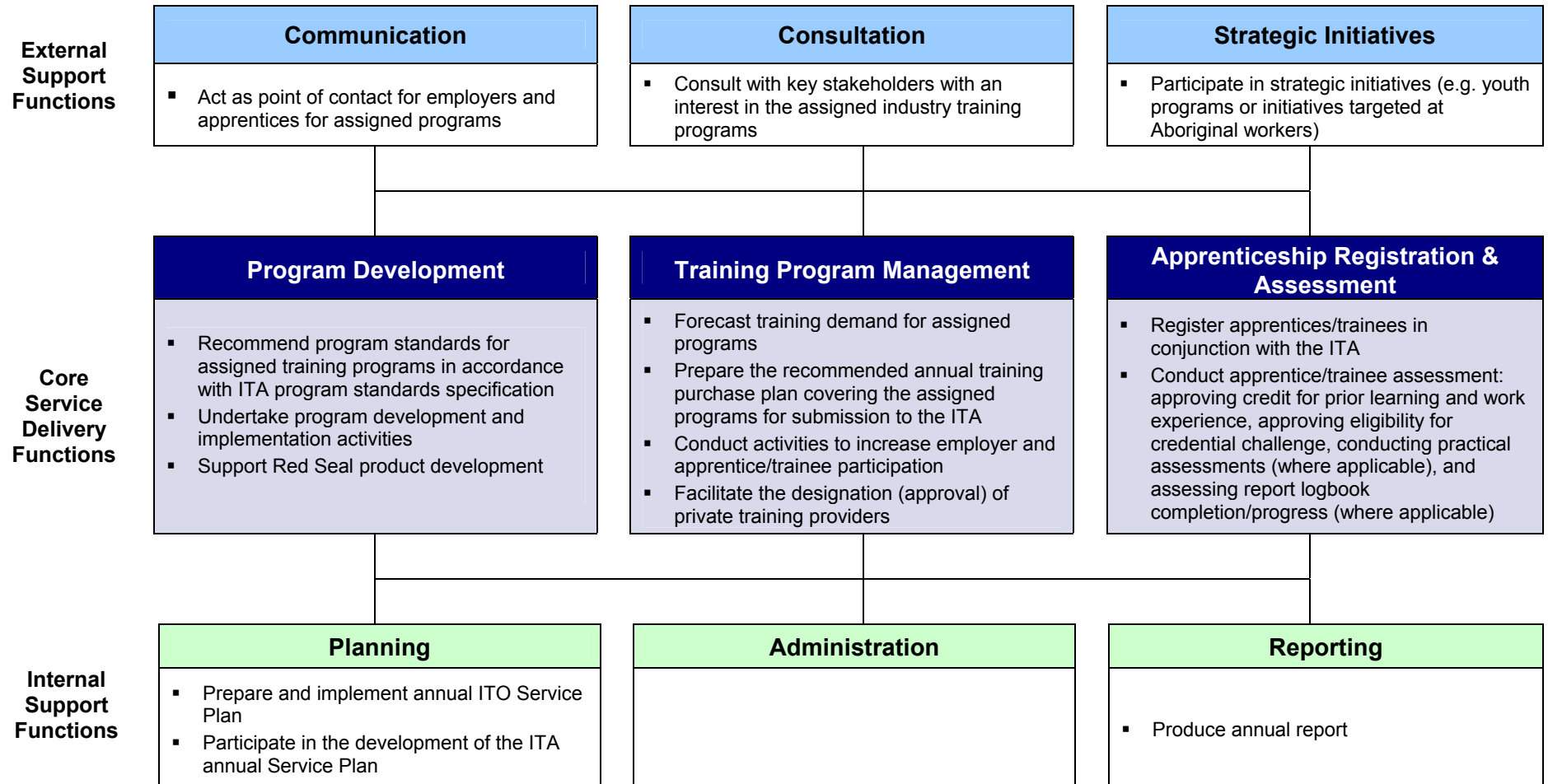
- **Program Development** involves updating standards, program outlines, and assessment tools as well as recommending and leading the development of new programs.
- **Planning for Training Programs** involves defining current and anticipated future training needs, reflecting those needs in the development of annual training purchase plans and identifying areas where shortages exist or are expected to develop in order to determine where CITO should conduct activities to increase the participation of employers and apprentice.
- **Apprenticeship Registration and Assessment** involves performing due diligence of applications for challenges, credits for past learning and work experience, referrals of accredited assessors for practical assessments and approval of log books

### ***External Support Functions***

External support functions are those which are undertaken in support of the core service delivery functions and which involve working with external stakeholders. External support functions are not undertaken for their own ends (e.g., you do not consult for the purpose of consulting) but rather to facilitate effective and efficient delivery of the core service delivery functions. The external support functions:

- **Communication** focuses primarily on proactive communications from CITO to key target groups including customers (apprentices and employers), stakeholders (e.g. the Board of Directors, industry, ITA, labour, government, joint boards, training institutions), and media.

PRIMARY FUNCTIONS OF CITO





- **Consultation** involves obtaining stakeholder input on the broader activities and plans of CITO as well as on specific issues such as substantive modifications to programs.
- Participation in **Strategic Initiatives** designed to address key issues. Possible examples include initiatives designed to improve completion rates for apprentices, develop a high school/entry program strategy, increase the number of employers who train apprentices, and develop a training/productivity framework for apprentices.

**Internal Support Functions**

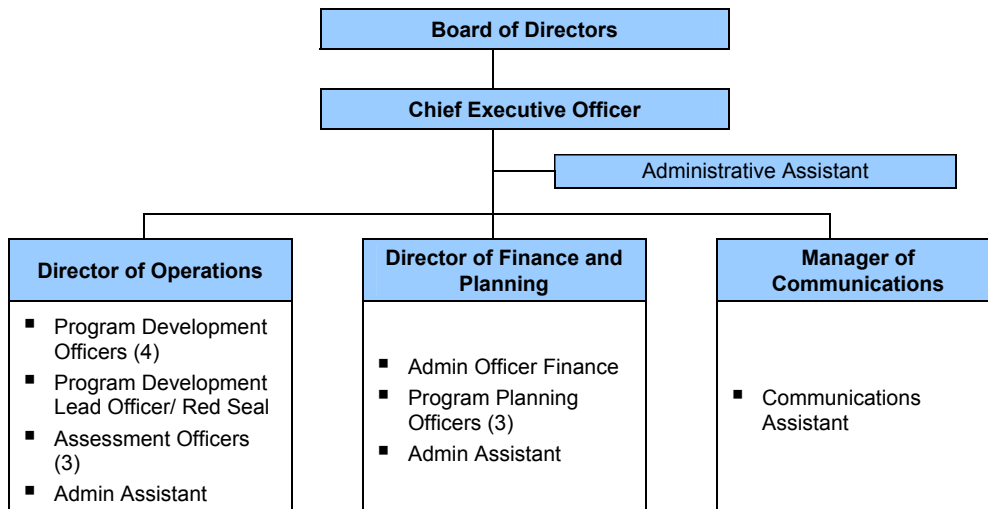
Internal Support Functions are necessary for the delivery of the core service delivery functions. These include activities related to:

- **Development of Annual Service Plans.** Towards this end, CITO Board will stage a annual strategic planning workshop which defines the vision, goals, sector priorities and strategies, and establishes performance measures and targets. CITO will also participate in ITA strategic planning sessions.
- **Administration** including management, finance and administrative support.
- **Reporting.** CITO will prepare an annual report, summarizing its major activities and the progress made against the strategic directions and performance indicators outlined in the Service Plan.

**ORGANIZATIONAL STRUCTURE**

CITO will require a staff of 20 to fulfill the core, external and internal functions outlined in the chart. The proposed organization structure including various positions is presented in the chart below.

**ORGANIZATIONAL STRUCTURE OF CITO**

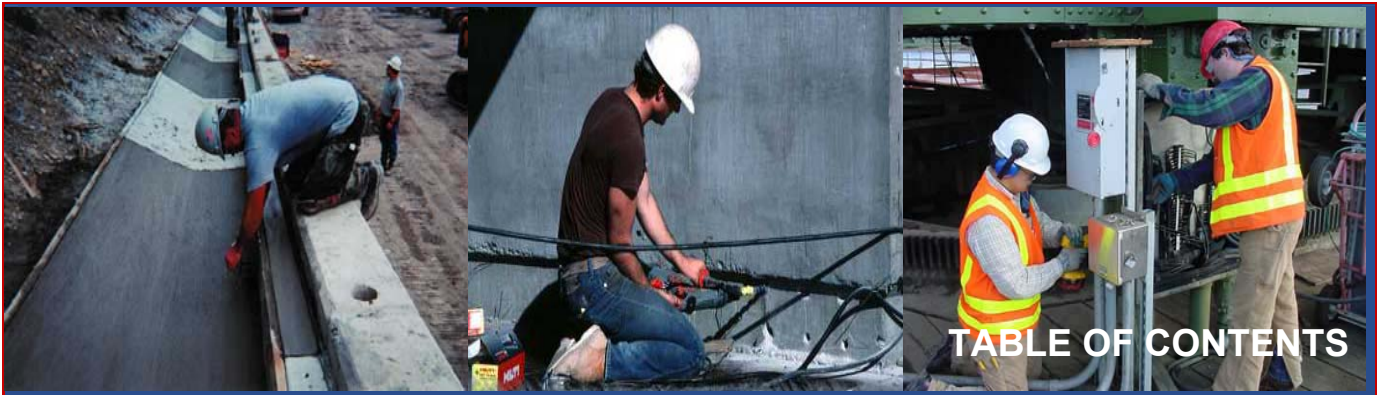


## **RESOURCE REQUIREMENTS**

Administration and program costs for full-service delivery are budgeted at approximately \$3.6 million annually. The primary cost is wages and benefits, which are budgeted at approximately \$2 million. The annual budget also includes \$500,000 for strategic initiatives and \$200,000 for consultation and communications to enable CITO to keep in contact with and consult with a wide range of stakeholders throughout the province.

In addition, a transition budget will be required to cover the costs associated with moving to larger quarters, undertaking lease-hold improvements in the new facilities, purchasing furniture, computers and other equipment, recruiting and training staff, and implementing communication systems. These one-time costs are budgeted at \$322,000.





**1 Introduction**

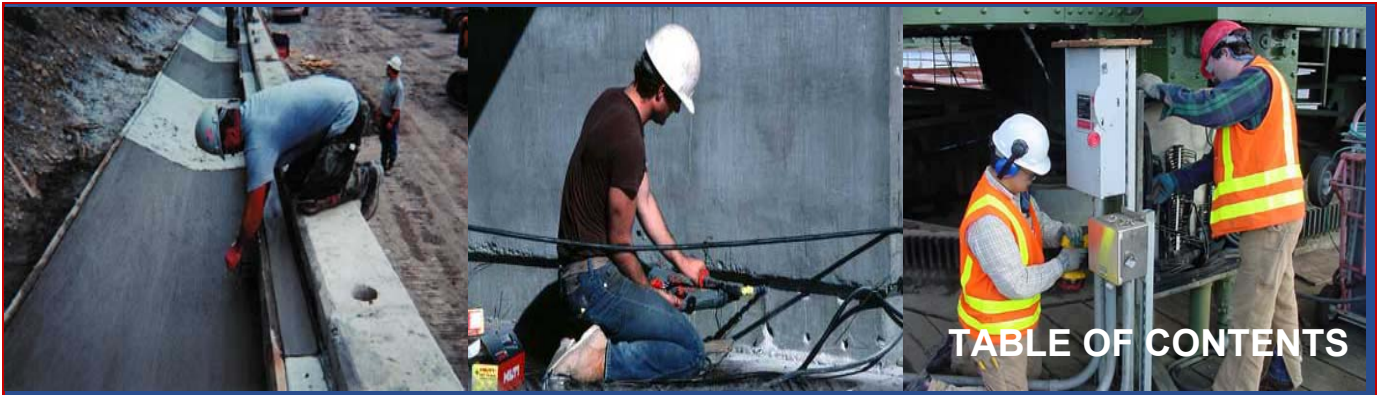
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- 1 Purpose of Study
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## I. INTRODUCTION

### A. BACKGROUND

The mandate of the Construction Industry Training Organization (CITO) is to provide leadership and active engagement in defining and meeting industry training needs. CITO will function as the hub of the training system creating and maintaining a skilled workforce for the construction industry. CITO has responsibility for the largest sector of the construction industry including: institutional construction (public facilities), commercial construction, industrial construction, multi-unit high rise residential construction, bridge and other forms of civil construction. CITO is currently responsible for 28 trades and 21 foundation programs.

The Industry Training Authority has established an Industry Training Organizations Policy (ITO Policy ITO6001) to govern the establishment of ITOs in BC. The policy describes the core responsibilities of the ITO and provides a Development Matrix describing the three stages of an ITO's existence: start-up; developmental; and full-service delivery stages. CITO is currently in the developmental stage and would like to proceed to the full-service delivery stage. The final or full-service delivery stage involves an ITO assuming full responsibility for the services and tasks identified by the ITA, which include the following:

- Prepare and implement annual ITO Service Plan and produce annual report;
- Approve program standards for assigned training programs in accordance with ITA program standards specifications;
- Act as a point of contact for employers and apprentices for assigned programs;
- Undertake program development and implementation activities;
- Forecast training demand for assigned programs;
- Conduct activities to increase employer and apprentice/trainee participation;
- Participate in the development of the ITA annual Service Plan;
- Consult with all key stakeholders with an interest in the assigned industry training programs;
- Register apprentices/trainees in conjunction with the ITA;
- Conduct apprentice/trainee assessment;
- Coordinate and manage Red Seal product development;
- Designate (approve) training providers;
- Participate in ITA strategic initiatives (youth programs, aboriginal); and
- Prepare annual training purchase plan for assigned programs and recommend to ITA, including relative levels of investment by program type (e.g., foundation, apprenticeship, youth, aboriginal, etc.).

### B. PURPOSE OF THE STUDY

The purpose of the project is to develop a full-service delivery model for the construction industry of BC to be implemented by CITO. The specific requirements of the assignment are as follows:

1. Research and information gathering with respect to the CITO operating environment, particularly in relation to the trades covered by the CITO mandate.
2. Investigation of the requirements for a full-service ITO by examining the elements of the ITA service matrix in light of models from diverse venues and completion of a draft full-service plan for discussion and consultation.
3. Development of communication and consultation strategies to be utilized by CITO to gather and disseminate information from and to stakeholders.

4. Completion of consultations with diverse stakeholders to validate the most viable full-service model.
5. Completion, in collaboration with the Steering Committee, of a validated full-service model for CITO with a cost analysis and an implementation strategy.

### **C. METHOD OF STUDY**

The assignment was undertaken in five distinct components including:

- The environmental scan;
- Investigation of the requirements for a full-service ITO;
- Development of communication and consultation strategies to be utilized by CITO;
- Consultations with diverse stakeholders to validate the most viable full-service model; and
- Completion, in collaboration with the Steering Committee, of a validated full-service model for CITO with a cost analysis and an implementation strategy.

A summary of the objectives, major activities and timing associated with each of the components is provided in the table on the following page. A more detailed description of the steps undertaken in each component is provided in Appendix I.

### **D. STRUCTURE OF THE REPORT**

This report is divided into four chapters:

- Chapter II provides background information relevant to the organizational model including guidelines established by the ITA for ITOs, the mandate and structure of CITO, and the major findings of the environmental scan.
- Chapter III provides an overview of the each of the functions to be undertaken by CITO including the objectives, outputs, target groups, inputs, activities, and resource requirements for each.
- Chapter IV summarizes the recommended organizational model, outlines the resource requirements, presents an implementation plan, and defines a series of performance measures.

Because of the length of the report, the appendices have been bound separately. In addition to the describing the steps undertaken in each phase, the appendices summarize the results of the environmental scan, interviews conducted with other jurisdictions in Canada, and the results of the industry consultations on the proposed model.

OVERVIEW OF THE FIVE PROJECT COMPONENTS

Component	Objectives	Key Activities	Timing
<p><b>Environmental Scan</b></p>	<p>Describe support services currently provided to apprentices, employers and stakeholders as well as the communication methods and vehicles currently in place</p>	<ul style="list-style-type: none"> <li>• Initial meeting with the Steering Committee</li> <li>• Detailed literature and Internet search</li> <li>• Interviews with key industry representatives to obtain information on trades falling under the purview of CITO</li> <li>• Gather similar information from sectors of similar trades outside of the CITO mandate</li> <li>• Prepared draft report (November 9)</li> <li>• Met with the Steering Committee (November 15th)</li> </ul>	<p>October to November 2007</p>
<p><b>Investigate Requirements for a Full-Service ITO</b></p>	<p>Develop a draft operational full-service delivery model for CITO</p>	<ul style="list-style-type: none"> <li>• Detailed review of the policies and other background documentation describing the requirements for a full-service ITO</li> <li>• Detailed literature and Internet search regarding potential approaches and strategies</li> <li>• Interviews with key informants</li> <li>• Define the deliverables required</li> <li>• Identify options for achieving these deliverables</li> <li>• Stage a workshop with the Steering Committee to obtain input on the key functions and discuss the resources required to support the activities &amp; strategies (January 10)</li> <li>• Conduct further research to define the key functions</li> <li>• In conjunction with CITO staff, recommend best options</li> <li>• Prepare a discussion paper containing a draft operational model (February 19)</li> </ul>	<p>December to February 2008</p>
<p><b>Develop CITO Communication and Consultation Strategies</b></p>	<p>Develop communications strategies to be utilized by CITO to gather and disseminate information from and to stakeholders</p>	<ul style="list-style-type: none"> <li>• Analyze communication needs of CITO (targets, types of information)</li> <li>• Determine need for regional communication strategies</li> <li>• Develop the key messaging for CITO and related stakeholders</li> <li>• Identify appropriate communication methods for interacting with clients and stakeholders</li> <li>• Stage a workshop with the Steering Committee to obtain input on potential communication and consultation strategies (January 10)</li> <li>• Determine the costs and resources necessary to carry out effective communication</li> <li>• Prepare a discussion paper summarizing the draft communication and consultation strategy (February 19)</li> </ul>	<p>November to February 2008</p>

Component	Objectives	Key Activities	Key Dates
<p><b>Consultations with Stakeholders</b></p>	<p>Carry out consultations with diverse stakeholders to validate the most viable full-service model for CITO</p>	<ul style="list-style-type: none"> <li>• Distribute discussion paper to stakeholder organizations inviting written submissions and presentations</li> <li>• Organize and host a series of consultations with industry and other stakeholders in 10 communities</li> <li>• Analyze and summarize the feedback obtained from the consultation sessions</li> <li>• Meet with the Steering Committee to review the results</li> </ul>	<p>April to June 2008</p>
<p><b>Develop Fully Operational Model for CITO</b></p>	<p>Develop a fully operational model for CITO including cost analysis and implementation strategy</p>	<ul style="list-style-type: none"> <li>• In collaboration with CITO staff, prepare a detailed description of the activities, intended outcomes and performance measures of an operational model</li> <li>• Conduct a detailed cost analysis</li> <li>• Develop an implementation plan</li> <li>• Meet with the Steering Committee to review the proposed full-service model for CITO including cost analysis and implementation strategy</li> <li>• Prepare a final report</li> </ul>	<p>June and July 2008</p>



## II. THE CONSTRUCTION INDUSTRY TRAINING ORGANIZATION

This chapter reviews the characteristics of Industry Training Organizations, the existing structure of CITO, and profiles the stakeholder groups which will be served by CITO.

### A. INDUSTRY TRAINING ORGANIZATIONS

#### 1. Three Stage Process

Since 2004, the Industry Training Authority (ITA) has had legislated responsibility to govern and develop the industry training system in BC. Industry Training Organizations (ITOs) such as CITO are created by the ITA to be responsible for improving industry training in a specific sector. They are not-for-profit legal entities with responsibility for designated industry training programs.

The ITOs are developed in a three-stage process encompassing start-up, developmental and full-service delivery.

- The start-up phase includes the basic organizational structures, hiring of key staff and establishing an office. This has been completed for CITO.
- The developmental phase sees the ITO assuming some of the core responsibilities that are part of its mandate and beginning to take a lead role in a number of areas related to specific trades programs and industry requirements. These include areas such as developing an annual service plan for the organization, communications, updating program standards, forecasting training demand, and developing an annual training plan for the institutions and colleges who deliver technical training for apprentices and foundation programs in Entry Level Trades Training (ELTT).
- The final or full-service delivery stage involves an ITO assuming full responsibility for the services and tasks identified by the ITA.

#### 2. ITO Operational Principles

ITOs are responsible to ITA and the ITA is responsible to the Government of British Columbia. The ITA retains the principal training funding function as well as being the final authority for approving standards, training plans and evaluation techniques. Some of the operational policies and principles established by the ITA to govern the operations of an ITO include the following:

- **The system shall be industry led.** Industry is best positioned and qualified to determine its own training needs and to coordinate the system. ITOs are industry-based bodies that take lead responsibility for industry training within a recognized industry sector. ITOs are initiated and supported by industry and approved by the ITA. All Board members must be from industry employers. Substantial industry commitment and participation is critical to the success of the ITO model.
- **Training standards is the core function.** ITOs are training standards bodies and are prohibited from undertaking lobbying activities on behalf of industry.
- **ITOs have a high degree of autonomy.** Autonomy of ITOs is required to produce results and this autonomy must be balanced with the ITA's overall accountability to government for the industry training system. An outcome/performance based model with a high level of accountability and

transparency offers the greatest flexibility to ITOs to achieve their objectives. ITO activities must not be inconsistent with the mandate and strategic direction of the ITA, but may extend beyond the objectives of the ITA.

### **3. ITO Funding**

Principles developed by the ITA to govern the funding of an ITO include the following:

- ITOs must strive to make the most effective use of public moneys.
- Operation funding of ITOs is a co-investment model (with industry in-kind contributions). Consistent with the principle of co-investment, industry is expected to demonstrate substantial in-kind contributions to the operation of the ITO.
- Funding should reflect the scope and scale of ITO activities.
- Funding should create a strong incentive to move to Full-service Delivery.
- A reasonable cap on administrative costs for the system should be maintained.
- The ITA will retain accountability for the purchase of training delivery from training providers. Purchase of training program delivery will, however, be primarily based on advice provided to the ITA through the ITO Training Plan Recommendation. Other relevant factors such as available financial resources and aggregate provincial training needs and regional access will also be considered.
- The annual approval of all funding to ITOs will be dependent on the ITO demonstrating effective past performance as measured by success in meeting key performance targets established in the approved Service Plan. Ongoing funding from the ITA is also subject to the ITO's ability to demonstrate good governance and transparency of operations, and is subject to government funding allocations to the ITA.
- ITO revenue generation plans must be consistent with the ITA mandate and policies. Given the ITA mandate of increasing participation in industry training, fees impacting sponsors, apprentices and trainees are generally discouraged, and any revenue generation plans including such fees will require the approval of the ITA.
- All funding is contingent on ITO meeting pre-determined performance targets. All funding is contingent on the ITA receiving anticipated funding from government.

The ITA has proposed three main categories of funding including operational funding, program maintenance funding, and funding for new program development (on a project basis).

## **B. MANDATE, VISION AND KEY STRATEGIC OUTCOMES FOR CITO**

CITO currently employs 5 staff members including an Executive Director who reports to an 11 member Board of Directors. The Board defined the mandate, vision, values and key strategic outcomes of the organization. The mandate is defined as follows:

*CITO provides industry leadership in training which results in the right number of workers, with the right knowledge and skills, developed to the right*

*standards, and available at the right time and for the right needs.*

The vision is:

*CITO-directed training matches worker competencies with employer needs and contributes to the long-term competitiveness, sustainability and vitality of the BC construction sector.*

In carrying out its mandate and pursuing its vision, CITO foresees achieving these key strategic outcomes:

- A better definition of current and anticipated future training needs within the sector;
- Better sector-wide training coordination and more effective resource allocation;
- Improved alignment between program standards and workforce requirements;
- Improved alignment of training options and pathways with apprentice needs;
- Enhanced recruitment and retention capabilities within the sector; and
- Improved workplace outcomes for apprentices.

### **C. THE ENVIRONMENT FOR CITO**

The characteristics of the trades and stakeholders that will be served by CITO include:

- **Under its mandate, CITO is currently responsible for 28 apprenticeship trade programs and 21 foundation programs.** The apprenticeship trade programs include Architectural Sheet Metal Worker, Bricklayer (Mason), Boilermaker, Cabinetmaker (Joiner), Carpenter, Cement Mason, Construction Electrician, Construction Formwork Technician, Domestic/Commercial Gasfitter, Drywall Finisher, Elevator Mechanic, Floor Covering Installer, Glazier, Hardwood Floorlayer, Heat and Frost Insulator, Ironworker, Metal Fabricator (Fitter), Painter and Decorator, Piledriver and Bridgeworker, Plumber, Plasterer, Refrigeration & Air Conditioning Mechanic, Reinforcing Steel Installer, Roofer, Security Alarm Installer, Sheet Metal Worker, Sprinkler System Installer, Tiler, and Wall and Ceiling Installer
- **CITO will function as the hub of the training system for its trades,** creating and maintaining a skilled workforce for the largest segment of the construction industry including institutional construction, commercial construction, industrial construction, multi-unit high rise residential construction, bridge and other forms of civil construction.
- **As the hub of the training system for the construction industry, CITO will interact with a wide variety of stakeholder groups.** In addition to the ITA and apprentices, CITO will work with employers (there are an estimated 40,000 employers involved in the construction sector of which 8,000 to 9,000 employ construction trade apprentices), a range of employer associations, training organizations (13 public and 11 private training organizations deliver training related to the CITO trades), joint boards, unions, the K-12 educational system, Provincial Government ministries and agencies, Federal Government departments, other ITOs and various other bodies.
- **Training requirements vary widely by trade.** The programs commonly require trainees to complete 12 to 24 weeks of training in-school although certain trades can be much higher (e.g., the electrician program requires 40 weeks). The technical training content is usually divided into 2 to 4 levels and, while most programs can be completed in 2 to 4 years, trainees have to successfully pass the practical assessments (where required) and written level examinations before he or she proceeds to the next level. Requirements for work-based training vary widely, from 2000 hours (reinforcing steel installer) to 7220 hours (refrigeration and air conditioning mechanic).

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- **Four trades account for three-quarters of the apprentices registered in the CITO trades.** Carpenter (28%), electrician (28%), plumber (14%), and sheet metal worker (5%) are the CITO programs with largest numbers of registered apprentices.
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- **Programs need to be regularly updated to keep current with industry practices and trends.** Of the 29 trades, 10 are currently in the process of being developed or updated, 2 were last updated in the past 3 years, 3 were last updated from 4 to 6 years ago, and 6 were last updated more than 10 years ago. We have no data when the other 8 programs were last updated.
- **Registered apprentices reside in communities throughout British Columbia.** Of the 21,183 apprentices, 52% reside in the Lower Mainland, 18% in the southern interior, 17% on Vancouver Island, and 7% in northern BC. The region of residence for 6% of the total trainees is not known.
- **One-half of the apprentices (51%) in the CITO trades have yet to register for any technical training.** The distribution of apprentices in terms of highest level of training for which he or she has completed include Level 1 (20%), Level 2 (15%), Level 3 (9%), and Level 4 (5%). Of the 10,711 apprentices who have not registered in any training, 65% have registered as apprentices within the past year, 24% registered 1 to 2 years ago, and 11% have been registered for more than 2 years. This suggests that a slowdown in construction activity could result in a significant increase in the number of apprentices enrolled in training programs.

A more detailed discussion of the findings of the environmental scan is provided in Appendix II.

### III. RECOMMENDED ORGANIZATIONAL MODEL

As noted in Chapter I, the Industry Training Organizations Policy (ITO Policy ITO6001) defines 15 services and tasks for which ITOs such as CITO would take responsibility in the full-service delivery stage. Many of these tasks and services are inter-related. For example, approving program standards for assigned training programs, undertaking program development and implementation activities, and coordinating and managing Red Seal product development all relate to program development. Similarly, forecasting training demand for assigned programs, conducting activities to increase employer and apprentice/trainee participation, designating (approving) training providers, and preparing annual training purchase plans for assigned programs for recommendation to the ITA all have relevance to the planning for and delivery of technical training programs. In addition, there are some functions that will be required (e.g., administrative functions) which are not specifically identified by the ITA.

Recognizing this, we divided the functions into three major categories including:

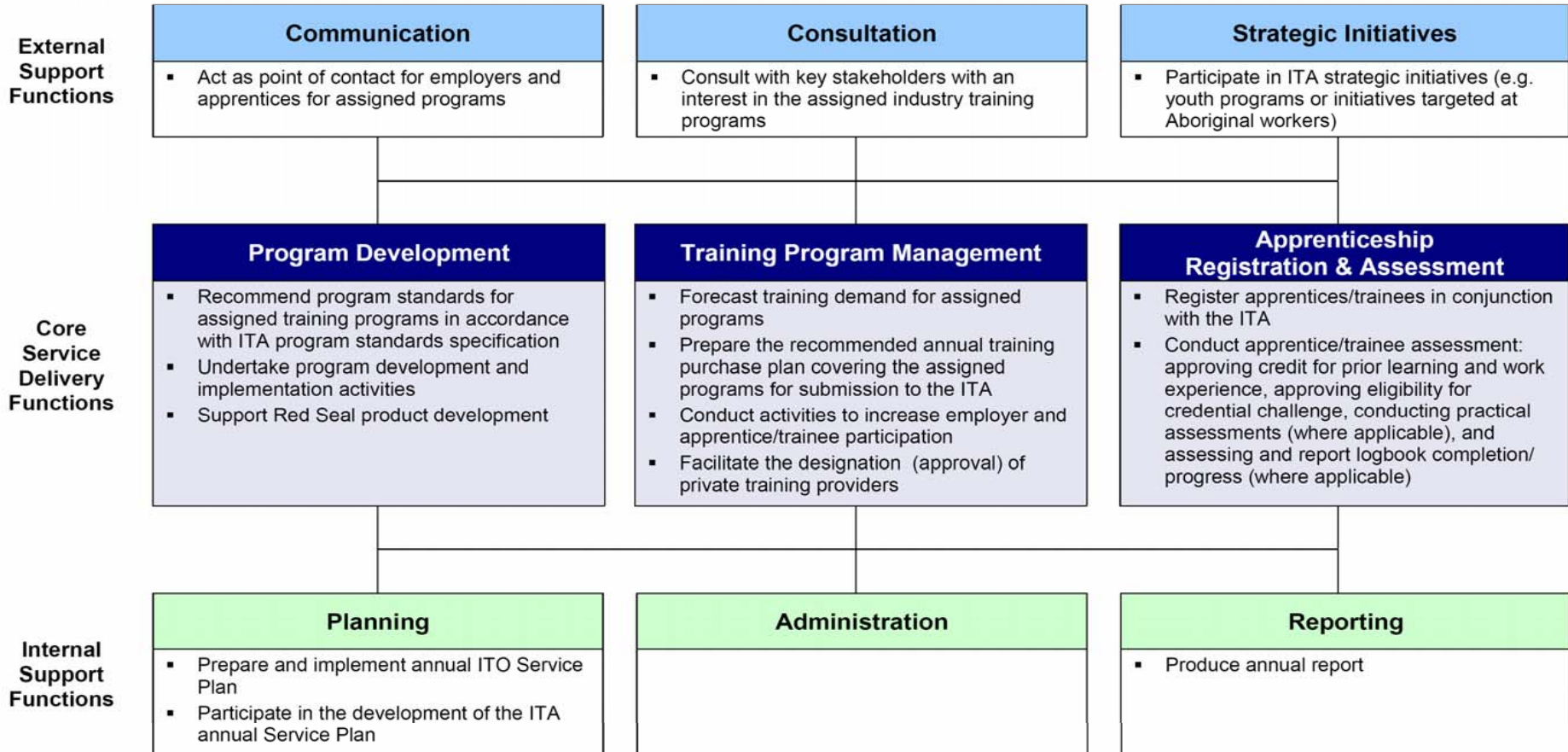
- **Core service delivery functions** which reflect the key activities of the ITO. We have defined the core functions to be program development, planning for training programs, and apprenticeship registration and assessment.
- **External support functions.** External support functions are those which are undertaken in support of the core service delivery functions and which involve working with external stakeholders. These are support functions in that they are not undertaken for their sake alone but rather to contribute to one of the key service delivery functions (e.g., CITO will not consult for the purpose of having consulted but rather to obtain input which will be useful in program development, planning for training or other core functions). We have defined the external support functions to be communication (i.e., proactive communication from CITO to key stakeholders as well as serving as a contact point), consultations (formal processes or systems put in place to obtain input on key issues), and strategic initiatives which will contribute to core service delivery.
- **Internal support functions** include activities related to the development of service plans, administration (e.g., accounting) and reporting.

Each of the 15 tasks and services defined by the ITA has been assigned to one of the functional areas in the chart on the following page. Based on the results of our research, input provided by the Steering Committee, interviews with representatives of other jurisdictions, and the results of the consultation sessions, we prepared preliminary profiles of the various functions (a summary of the results of the interviews with other jurisdictions is provided in Appendix III while the results of the industry consultations are summarized in Appendix IV). More specifically, the profiles provided on the following pages cover the following functions:

- A. *Program Development:* Approve program standards for assigned training programs in accordance with ITA program standards specifications/Undertake program development and implementation activities
- B. *Red Seal Product Development:* Coordinate and manage Red Seal project development
- C. *Demand Forecasting for Assigned Programs:* Forecast training demand for assigned programs
- D. *Increase Employer and Apprentice Participation:* Conduct activities to increase employer and apprentice/training participation
- E. *Designation of Training Providers*
- F. *Annual Training Purchase Plan:* Prepare annual training purchase plan for assigned programs and recommend to ITA including relative levels of investment by program type (e.g. foundation, apprenticeship, youth, aboriginal, etc.)



PRIMARY FUNCTIONS OF CITO





- G. *Registration*: Register apprentices/trainees in conjunction with the ITA
- H. *Assessments*: Conduct apprentice/trainee assessments
- I. *Participate in ITA Strategic Initiatives* (youth/aboriginal)
- J. *CITO Service Plan*: Prepare and implement annual ITO service plan
- K. *ITA Service Plan*: Participate in the development of the ITA annual service plan
- L. *Annual Report*: Produce annual report
- M. *Contact*: Act as a point of contact for employers and apprentices for assigned programs
- N. *Communication*
- O. *Consultation*: Consult with all key stakeholders with an interest in the assigned industry training programs

The profile of each of the functional areas outlines the:

- The *Objectives* that the function seeks to achieve;
- The physical *Outputs* generated by the function;
- The *Target Groups* on which the function is focused;
- The *Distribution of the Outputs* in terms of how the outputs are made available to stakeholders;
- *Key Inputs*, particularly the key information that is required;
- *Participants in the Process* including the individuals or groups that are necessary to successful completion of the function;
- *Activities* in terms of the specific steps that will be undertaken;
- *Timing* refers to when the functions are scheduled to be undertaken;
- *Resource Requirements*, particularly estimates of full-time equivalent (FTE) requirements. A further discussion of the resource requirements is provided in Chapter IV.
- *Performance Indicators* (the measurable results that indicate the success level of a function); and
- *Performance Tracking* in terms of the means and process used to record the performance indicators.

## **A. PROGRAM DEVELOPMENT**

### **1. Introduction**

Under its mandate, CITO is currently responsible for 28 apprenticeship trade programs and 21 foundation programs. The programs need to be updated on a regular basis to ensure that they remain current with industry practices and trends. Of the 28 trades, 10 are currently in the process of being developed or updated, 2 were last updated in the past 3 years, 3 were last updated from 4 to 6 years ago, and 6 were last updated more than 10 years ago. We have no data for when the other 8 programs were last updated.

CITO will play a key role in:

- Updating standards, program outlines, and assessment tools (e.g. exam banks) for existing apprenticeship programs; and
- Recommending and leading the development of new programs.

CITO has a standard process in place to establish standards, prepare program outlines and develop assessment tools. Any substantive modifications to existing programs must be approved by the ITA. According to ITA policy, a substantive modification is defined as a change in program name, competency profile, assessment method, program duration, entry requirements, certification model, or challenge process. A change in course content and/or delivery methodology of an existing Industry Training Program is not considered substantive.

There are no procedures currently in place for field testing of exams in BC. Given the importance of the

ensuring that the exams are credible, valid, and fair, there is an argument for extensive field testing of the exam banks (e.g. having each question being answered by 30 people). At this point, most regions do not do formal field testing. Some regions use peer reviews or review the results of the first applications to determine if there seem to be problems. Other ITOs have not done field testing but the Automotive Industry Training Association (AITA) has developed exam banks which have been sent to the ITA for which they did a peer review with instructors. The Residential Construction Industry Training Organization (RCITO) is developing some field tests for its exam bank.

Any new programs must also be approved by the ITA. New programs are first proposed by industry groups which prepare a preliminary proposal (leading to approval-in-principle from the ITA Standards Committee) and a formal final proposal. CITO will play a role in reviewing both preliminary and final proposals, making recommendations, and (if approved) developing program outlines and assessment tools. Any new program must first be piloted and will obtain final approval from the ITA Board of Directors only upon a successful pilot based on formal assessment of successful outcomes in accordance with the evaluation plan criteria defined in the initially approved program proposal.

**2. Components**

Elements	Description
<p><b>Objectives</b></p>	<ul style="list-style-type: none"> <li>• Maintain up to date program standards for all trades</li> <li>• Maintain the high quality of training programs for all trades</li> <li>• Operate within the established ITA policy framework</li> <li>• Establish and maintain guidelines relating to the development and/or modifications of program standards for assigned programs</li> </ul>
<p><b>Outputs</b></p>	<ul style="list-style-type: none"> <li>• Detailed program outlines</li> <li>• Program profile (program description)</li> <li>• Table of specifications for examinations</li> <li>• Exam banks (equivalent of 3 exams per level, normally 4 levels, and each exam is 100 questions)</li> <li>• Assessment of proposed new programs</li> </ul>
<p><b>Target Groups</b></p>	<ul style="list-style-type: none"> <li>• The primary target groups are the ITA who will approve new programs and any substantive changes to existing programs as well as trainers who will take a lead role in implementation</li> <li>• Other potential users of outputs include apprentices, associations unions, employers, and the Provincial Government</li> </ul>
<p><b>Distribution of Outputs</b></p>	<ul style="list-style-type: none"> <li>• Detailed program outlines, profiles (program description), and table of specifications for examinations may be produced in binders for distribution to key parties and posted on the website. Key stakeholders will generally be notified by e-mail and directed to the website</li> <li>• Exams banks are closely managed to restrict access</li> </ul>
<p><b>Key Inputs</b></p>	<ul style="list-style-type: none"> <li>• Review of existing program standards and outlines</li> <li>• Review of practices in other jurisdictions</li> <li>• View of industry and other key stakeholders participating in the process</li> <li>• Requirements under the national Red Seal program</li> <li>• Input from specialized agencies (e.g. various Provincial Government agencies depending on the area – such as WorkSafe for gas issues)</li> </ul>

Elements	Description
<p><b>Participants in the Process</b></p>	<ul style="list-style-type: none"> <li>• CITO Board: Approves request for review and resulting standards and outputs</li> <li>• Process Governance Committee: oversees the entire process and recommends Subject Matter Experts (SME) committee</li> <li>• Process Subject Matter Experts committee: participates in the development workshops</li> <li>• CITO staff: lead the process (e.g. recruiting committee members, preliminary and post committee work, staging sessions)</li> <li>• CITO Standards Committee: review recommendations</li> <li>• SME exam committee (usually made up of instructors): compose the exam questions</li> <li>• ITA Board: final approval of new programs and substantive changes to existing programs</li> </ul>
<p><b>Activities</b></p>	<p><i>New Program Development</i></p> <ul style="list-style-type: none"> <li>• CITO receives preliminary proposal for new training program from industry</li> <li>• CITO staff review the preliminary proposal, interact with proponents regarding further information required, assess proposals against established guidelines and criteria, and make recommendations to the CITO Board</li> <li>• On approval by the Board, preliminary proposal is submitted to the ITA Standards Committee for approval-in-principle</li> <li>• On approval, CITO provides guidance to industry regarding the development of a formal proposal which should include an executive summary, evidence of industry support, information on labour market demand/mobility, a competency/skill profile, and descriptions of training requirements, the relationship to other occupations, other approvals/requirements needed, impacts and benefits, sustainability, the financial model, and the implementation strategy</li> <li>• CITO staff validate the occupational analysis and proposed standards through independent technical review and prepare a report making recommendations to the CITO Board</li> <li>• On approval by the CITO Board, the final proposal is submitted to the ITA Standards Committee which in turn makes recommendation to the ITA Board which makes the final decision</li> <li>• On approval by the ITA, CITO leads development of the program outlines and assessment tools (as outlined below)</li> </ul> <p><i>Standards Setting/Development of Program Outline</i></p> <ul style="list-style-type: none"> <li>• CITO Board receives request or approves staff recommendation for scheduled review of existing program or approval of proposed new program by the ITA Board</li> <li>• Staff convene a Governance Committee to oversee process</li> <li>• Governance Committee recommends names for project SME committee</li> <li>• Staff recruit SME committee</li> <li>• Staff research issues and prepare for SME meeting</li> <li>• One week workshop staged with SME committee</li> <li>• Staff produce program documents</li> <li>• Documents sent to stakeholders for comment</li> <li>• Staff finalize program documents</li> <li>• Program profile, description and outline reviewed by Governance Committee</li> <li>• On approval, sent to CITO Standing Program Standards Committee</li> </ul>

Elements	Description
	<ul style="list-style-type: none"> <li>• On approval, sent to CITO Board</li> <li>• On approval of substantive changes, sent to ITA Board</li> </ul> <p><i>Exam design</i></p> <ul style="list-style-type: none"> <li>• On approval of standards and program outlines, staff convene new SME exam committee</li> <li>• Staff recruit committee members</li> <li>• Staff undertake 1 week of preparation for workshop (prepare table of specifications)</li> <li>• Workshop is staged over 3 to 4 weeks (one for each level of the program)</li> <li>• Field testing of exams is undertaken – potentially a 6 to 8 week process (30 writes of each exam)</li> </ul> <p><i>Program launch process</i></p> <ul style="list-style-type: none"> <li>• Joint communication with ITA</li> <li>• Update the CITO website</li> <li>• Stakeholders directed to website where documents are located</li> <li>• Further communications undertaken if issues arise</li> </ul>
<p><b>Timing</b></p>	<ul style="list-style-type: none"> <li>• Normally there will be a 5-year cycle for trades updating (i.e. every trade is updated about every five years)</li> <li>• There is an average 6 month calendar time for development and implementation</li> <li>• About 6 programs updated/developed per year including existing programs and occasional new programs</li> </ul>
<p><b>Resource Requirements (People/Other)</b></p>	<ul style="list-style-type: none"> <li>• Estimated staff time based on an average of about 6 programs per years is a minimum of 3.0 FTEs for program development. Program development costs (including staff) are estimated to be about \$85,000 per program</li> <li>• An additional 1.5 FTE could be involved in facilitating alternative delivery methods and administering the field testing of exams. The cost of full-fledged exam field testing is estimated to be \$5,000 to \$8,000 per program.</li> </ul>
<p><b>Potential Performance Indicators</b></p>	<ul style="list-style-type: none"> <li>• Number of updated and new programs per year</li> <li>• Number of exam questions developed and field tested</li> <li>• Approval of standards and programs</li> <li>• Perceptions of stakeholders regarding the outputs</li> </ul>
<p><b>Performance Tracking</b></p>	<ul style="list-style-type: none"> <li>• Documentation of progress made</li> <li>• Periodic survey of stakeholders</li> </ul>

## **B. RED SEAL PRODUCT DEVELOPMENT**

### **1. Introduction**

The Interprovincial Standards Red Seal Program (also known as the Red Seal Program) was established more than 45 years ago to provide greater ease for mobility of skilled workers throughout Canada. The Canadian Council of Directors of Apprenticeship (CCDA), which includes the director of apprenticeship from each provincial and territory as well as two Human Resources and Social Development Canada (HRSDC) representatives, works with industry in the development of a skilled labour force and facilitation of labour mobility throughout Canada. This is achieved by:

- Developing, implementing and recognizing Red Seal occupations and credentials;
- Promoting high standards in occupational training;
- Fostering harmonization in training among jurisdictions; and
- Increasing public awareness of apprenticeship training and certification.

The Interprovincial Standards Education Committee (ISEC) is a work group of the CCDA that has the responsibility for ensuring the continued compliance with the high standards of the Red Seal program. More specifically, ISEC is responsible for:

- Developing, validating and revising national occupational analyses for the Red Seal trades;
- Developing and validating inter-provincial standards examinations, and
- Setting and monitoring guidelines and security procedures for examinations.

ISEC is also responsible for the maintenance of documents that support the Red Seal Certification Program across Canada (e.g. The Red Seal Operations Manual). ISEC consists of one member from each province and territory and at least one member from HRSDC. The jurisdictional members are the people responsible for the development of certification examinations for the designated trades in their respective jurisdictions. Members from HRSDC are staff members who are responsible for the monitoring of activity in National Occupational Analysis (NOA) and Interprovincial (IP) examinations development.

The Red Seal program currently encompasses 45 trades programs. Although all provinces and territories participate in the program, the level of involvement varies somewhat by region. For example, the 4 Atlantic Provinces participate in all 45 Red Seal trades, BC participates in 44 trades, and Ontario and Alberta participate in 43.

Of the 29 CITO trade programs, 19 are Red Seal programs. The credentials of a certified tradesperson who has successfully earned a Red Seal ticket are recognized across Canada. An inter-provincial Red Seal Examination is required for the 19 Red Seal Accredited Programs. The Red Seal programs account for 96% of the apprentices registered in the CITO trades.

Each Red Seal Program is updated on a regular basis (generally a 5 year cycle). Updating of a particular program is led by one province (the host province) with the assistance of other participating provinces. The key outputs include:

- The National Occupational Analysis (NOA). The NOA is a document that lists the blocks, tasks and sub-tasks performed by workers in a designated trade or occupation in jurisdictions across Canada. The NOA for Red Seal designated trades are prepared by industry experts under the guidance of the Federal Government and the assistance of the provincial/territorial jurisdictions in which the trade or occupation is designated. It is used as the base document in the development of an interprovincial "Red Seal" examination or examination item bank.

- An exam bank for the Interprovincial (IP) Exam. The IP exam is used to determine whether completing apprentices and experienced journeypersons meet the national standard in a designated "Red Seal" trade or occupation. The exam banks enable the generation of random, standardized examinations that will be administered at the conclusion of the technical training and on a challenge basis.

The process through which the NOA and exam bank is commonly developed or updated is as follows:

- Recruitment of subject matter experts (journeypersons or equivalent) for a national NOA workshop who broadly represent the trade (e.g. union and non-union representing the scope of activities) and geographical considerations (e.g. all provinces and territories as well as rural and urban).
- Preparation of the documents to be reviewed at the NOA workshop.
- Staging of the national NOA workshop in Ottawa (about 5 days).
- Preparation of the draft NOA by the host region.
- Distribution of the NOA to the participating provinces and territories.
- Provincial/territorial review of the draft NOA (1 day workshop). Provinces/territories are asked to confirm the tasks carried out in the trade within each jurisdiction and recommend weightings regarding the task areas that will be covered in the exams. This is commonly performed through a one-day workshop (about 5 hours) in each province with subject matter experts.
- Response to NOA feedback provided by other provinces/territories by the host.
- Development of Table of Specifications (TOS). The NOA is used to develop the TOS by the host province, which is the foundation for the exam questions. Each province has the opportunity to provide feedback on the TOS.
- Response to TOS feedback provided by other provinces/territories by the host province.
- Preparation of the documents to be reviewed at the exam workshop.
- Staging of the exam workshops. Development of the exam items (e.g. questions) is led by the host province through a series of tables staged in Ottawa which includes industry representatives, faculty and table facilitators. All jurisdictions participate in the process.
- Review of the exam questions by HRSDC with a particular focus on grammar, spelling, punctuation and consistency with ISEC Standards.
- Validation of the exam by faculty and representatives within the host jurisdiction, with participation from neighboring jurisdictions and HRSDC (4 day workshop)
- Staging of the translation workshop (3 days), which involves HRSDC, translator, facilitator, host province representative, and bilingual industry representatives.
- Entry of questions into the ICEMS database.



- Peer review of exam generated through the exam management system.
- Analysis of the results of implementation by the host province (e.g. reviewing overall scores, comparison across jurisdictions, item analysis, and feedback from candidates)

The expectation of the ITA is that they will continue to:

- Represent BC on the CCDA and on ISEC;
- Lead the development of the NOA, TOS, and exam bank for the BC host trades;
- Enter exams into ICEMS;
- Administer, invigilate, score and maintain security of the Red Seal examinations in BC; and
- Prepare jurisdictional reports for CCDA.

The expectations are that the role of CITO will be to:

- Recommend industry representatives, faculty and facilitators to participate in the process;
- Lead the provincial review of the NOAs for its trades;
- Develop the TOS for its trades where BC is the host province and respond to any feedback received from other regions;
- Review the TOS for other trades where BC is not the host province;
- Participate in the exam development workshop, translation workshop, and exam validation workshop for its trades where BC is the host province; and
- Participate in the peer review of the exam for its trades where BC is the host province.

**2. Components**

Elements	Description
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Assist the ITA in meeting its requirements in the Red Seal Program</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Referrals of potential participants in the process including industry representatives, faculty and facilitators to participate in the process</li> <li>• Provincial review of NOAs for its trades</li> <li>• TOS for its trades where BC is the host province</li> <li>• Feedback on NOAs and TOS for non-host trades</li> <li>• Participate in the exam development workshop, translation workshop, and exam validation workshop</li> <li>• Feedback on exam questions</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• ITA</li> <li>• Host provinces/territories for other trades</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Referrals for the ITA</li> <li>• TOS provided to the ITA</li> <li>• Feedback on NOAs, TOS for non-host trades, and exam questions to host provinces/territories</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Red Seal Operations Manual/Red Seal requirements</li> <li>• Input from key stakeholders and other jurisdictions</li> </ul>

Elements	Description
Participants in the Process	<ul style="list-style-type: none"> <li>Subject matter experts</li> <li>Faculty representatives</li> <li>ITA</li> <li>CITO staff</li> </ul>
Activities	<p><i>For the five trades where BC is the host province:</i></p> <ul style="list-style-type: none"> <li>Recommend industry representatives, faculty and facilitators to participate in the process</li> <li>Lead the provincial review of the NOAs for its trades</li> <li>Develop the TOS for its trades where BC is the host province and respond to any feedback received from other regions</li> <li>Participate in the exam development workshop, translation workshop, and exam validation workshop</li> <li>Participate in the peer review of the exam for its trades</li> </ul> <p><i>For the 14 trades where BC is not the host province:</i></p> <ul style="list-style-type: none"> <li>CITO staff or designate attend inter-provincial SME meeting (5 days) to vote on changes</li> <li>CITO act as meeting facilitator as required (50% of meetings)</li> <li>CITO staff or designate attend translation workshop (5 days)</li> <li>Recommend industry representatives, faculty and facilitators to participate in the NOA and exam development processes</li> <li>Lead the provincial review of the NOAs for its trades</li> <li>Review the TOS prepared by other host jurisdictions</li> </ul>
Timing	<ul style="list-style-type: none"> <li>Service Canada reviews each Red Seal trade every 4 to 5 years</li> <li>Processes take about 18 months to complete</li> </ul>
Resource Requirements (People/Other)	<ul style="list-style-type: none"> <li>Minimum of 1 FTE</li> </ul>
Performance Indicators	<ul style="list-style-type: none"> <li>Number of steps led and number participated in</li> <li>Acceptable pass rate for Red Seal exams by apprentices</li> <li>Feedback from the ITA and participants referred</li> </ul>
Performance Tracking	<ul style="list-style-type: none"> <li>Exam results</li> <li>Documentation of activities</li> </ul>

### C. DEMAND FORECASTING FOR ASSIGNED PROGRAMS

#### 1. Introduction

CITO is expected to prepare demand forecasts for its assigned programs. Two key potential uses of the demand forecasts would be to:

- **Define current and anticipated future training needs within the sector which can then be reflected in the development of annual training purchase plans** (outlined in Section F).

- **Identify areas where shortages exist or are expected to develop in order to determine where CITO should conduct activities to increase the participation of employers and apprentices** (outlined in Section D)

Forecasting the demand for training commonly takes two forms:

- **Short-term forecasting** (the demand for training over the next year or two years). The primary focus of most jurisdictions is on short-term forecasting, which is used to develop training plans. These jurisdictions typically start with the past demand for training and then make what are normally small adjustments to reflect changes in projected demand (as evidenced by changes in early registration levels and other indicators) and perhaps key sector trends or new developments in a particular region. The forecasts are generally prepared by the staff of the organizations. It should be noted that most regions still have field staff and some form of centralized registration system which assist in the short-term forecasting process.
- **Medium to longer-term forecasts** (3 to 5 years or longer). While they focus primarily on the short-term, some jurisdictions also monitor longer-term trends using secondary data. In addition, some sectors, industries and occupations periodically do a labour market study which examines demand and supply for certain skills and may identify areas of undersupply or oversupply.

In the past, demand forecasting in BC focused on the short-term and was done primarily by examining the number of apprentices who registered in courses by college, trade, and level, and the number who were waitlisted. Field staff worked directly with apprentices and employers to identify when and where the apprentices would take their training. In the absence of field staff, it has become more difficult to project demand because many apprentices have not yet registered for training while others have registered at more than one institution. At the present time, there is no centralized registration system for apprenticeship training in BC. A recent report noted that a centralized registration system would prevent trainees from applying to more than one institution, ensure that there is good waitlist information, and make demand more predictable.<sup>1</sup> Uncertainty regarding whether waitlisted registrants will, in fact, attend their classes has placed an increased burden on the training providers who allocate significant resources to follow-up with waitlisted registrants to confirm their intentions. The ITA has offered to pay for the development of a centralized registration system.

In the absence of a centralized system, the public training providers have come together to form a consortium to better coordinate the planning of trades training. The consortium has built a system which tracks all trades training for ITA programs (e.g. where it is taught, location, trade, dates, hours, capacity, registration and waitlists) to better inform discussions between colleges regarding where there are shortages or overcapacity. A possible next step is for this system to evolve into a registration system that would be open to apprentices, employers, and colleges. Some of the constraints to moving forward are the lack of shared vision, the competitive environment between training providers, and time constraints amongst the key players. A major driver of the progress to date has been the focus of the ITA and colleges on increasing capacity utilization rates. In our interviews, concerns were expressed that the current system is costly to administer for the training providers and has inherent constraints with respect to projecting demand for training and managing registrations across the system.

Some of the secondary sources can be used to gauge longer-term demand including:

- The Construction Sector Council (CSC) report. The CSC forecasting model relies heavily on an analysis of Major Projects to develop demand figures. The supply side is estimated from the flows of apprentices coming out every year, of recent immigrants and people re-entering the job market

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<sup>1</sup> The Resource Planning Group Inc., *Capacity Reviews For Trades Training In BC*, August 7, 2007

after a period of non-participation. The CSC Report, "Construction Looking Forward: Labour Requirements from 2007 to 2017 for British Columbia" notes that a tight labour market is "leading to increased overtime, increased recruitment efforts, modified hiring practices, increased reliance on inter-provincial mobility, project delays and deferrals, safety and quality concerns, and pressure on training programs to expand." This report forecasts shortages of construction workers in virtually every trade over at least the next three years. These conditions indicate a need for more training facilities, programs and instructors. There is a need for more apprenticeship training as well as for more specialized programs for new entrants and upgrades to meet expanding demand and replace retiring workers. Even though activity will begin declining sometime in 2009, the labour market will not change dramatically due to demographic changes and "what was earlier considered a tight labour market will now be regarded as normal."

- Labour demand forecasts by the Strategic Policy Research Directorate (SPRD) of Human Resources and Social Development Canada (HRSDC). This agency produces a detailed 10-year labour market forecast at the national level every year. HRSDC uses forecasting models to identify likely trends over the medium term in the level, composition and sources of labour demand and labour supply, and in the industrial and occupational distribution of employment. A key objective is to identify occupations where the current and projected states of supply and demand suggest that imbalances could develop or persist over time. The department's assessment of future labour market imbalances by occupation is based on the current balance between labour demand and supply and projections of the number of new job seekers emerging from the school system and from immigration and of the number of job openings resulting from expansion demand and from retirements. Using this methodology, the agency has identified occupations where demand will exceed supply in the next decade. Construction related occupations in this situation are managers in construction; contractors and supervisors, trades and related; electrical trades; plumbers, pipe-fitters and gas fitters; carpenters; and masonry and plastering.
- The BC Ministry of Economic Development develops skill shortage forecasts using economic measures and employer based surveys. The economic measures used include: unemployment rates; employment growth; wage growth; vacancy rates; and employment outcomes. The trades in the construction industry that the Ministry believes will experience shortages over the next decade include: construction managers; trades supervisors; industrial electricians; power systems electricians; cement finishers; tile setters; plasterers, drywall installers, finishers & lathers; and painters and decorators.
- Various organizations that do employer surveys. Examples include:
  - The Canadian Federation of Independent Business quarterly survey that asks members if they have concerns about shortages of skilled workers;
  - The Business Council of British Columbia conducts a biennial skills survey;
  - Manpower Canada Services Inc. conducts a quarterly Employment Outlook Survey, which asks businesses about their hiring intentions over the coming quarter; and
  - The BC Chamber of Commerce released a report on the 'Skills Gap' in 2002 and will be creating a permanent panel of regular members that will identify opinions on current issues and conditions affecting their business.

The Federal Government is in the process of devolving some of its responsibilities for labour market information to the provinces which may help to expand the availability of BC specific labour market information.

Expectations regarding what steps CITO should take to forecast demand and the relative emphasis that should be placed on short-term versus medium-to-longer term forecasting have not been defined.

Considerable further work needs to be undertaken to establish an appropriate and effective forecasting system. Based on our review to date, we recommend that CITO:

- **Focus primarily on shorter-term demand.**
- **Work to develop a coordinated process for projecting and managing training demand on an on-going basis.** More specifically, CITO needs to work with the college system, other training providers, other ITOs, and the ITA in a multi-stakeholder process to design, develop, and implement a coordinated, effective and efficient system for projecting training demand, communicating with apprentices regarding courses, and coordinating and managing course registrations to appropriately balance the number of apprentices and training spaces. Major outputs of the process should include clearly defined roles and responsibilities for the various parties, a coordinated system including a centralized registration system, and clear, direct linkages between the demand forecasting function and the development of the annual training purchase plans. A key component of this system would be coordinated, cost-effective mechanisms for proactively contacting apprentices (e.g. online, through a call centre, training providers, and/or other stakeholders) to encourage and confirm registration in courses. It was suggested by several stakeholders that CITO could play a proactive role in contacting new apprentices and sponsors to encourage registration.
- **Rely largely on secondary sources for medium to longer-term forecasting on an on-going basis.** These secondary sources could include CSC reports, federal and provincial government projections, and any sectoral, regional, or occupational labour market analysis studies which are done. CITO could also play a role in identifying the need and championing the implementation of targeted labour market studies.
- **Develop mechanisms to obtain input from employer organizations on an on-going basis.** These mechanisms could include an online survey of sponsor organizations and apprentices, a telephone survey (perhaps as part of the ITA/BC Stats stakeholder awareness and customer satisfaction telephone survey), and regional meetings with industry representatives. The purpose would be to obtain input regarding existing skills shortages and key trends which may impact short-term and longer-term planning.

Once an appropriate forecasting system is in place, CITO should develop a provincial apprenticeship strategy for its trades. The primary objective of the strategy would be to better coordinate promotional activities, entry level training (including high school programs), and apprenticeship training with industry demand and workforce requirements.

**2. Overview**

Elements	Description
Objectives	<ul style="list-style-type: none"> <li>• Develop an efficient and effective system for forecasting</li> <li>• Determine the demand for training for use in the development of annual training purchase plans and in determining where CITO should focus on increasing the participation of employers and apprentices</li> </ul>
Outputs	<ul style="list-style-type: none"> <li>• Development of a coordinated, multi-stakeholder process for projecting and managing training demand on an on-going basis</li> <li>• Provincial apprenticeship strategy for the CITO trades</li> <li>• Forecast of demand for training (on-going)</li> </ul>

Elements	Description
Target Groups	<ul style="list-style-type: none"> <li>Internal use</li> <li>External users include the ITA, training organizations and other stakeholders</li> </ul>
Distribution of Outputs	<ul style="list-style-type: none"> <li>Used internally by CITO</li> <li>Used in communications with the ITA and training organizations</li> <li>Used in the development of proposals for initiatives to increase participation rates</li> </ul>
Key Inputs	<ul style="list-style-type: none"> <li>Registration and waitlist data</li> <li>Input from training organizations</li> <li>Secondary data</li> <li>Ongoing input from employers and other stakeholders</li> </ul>
Participants in the Process	<ul style="list-style-type: none"> <li>CITO staff will collect the primary and secondary data and conduct the analysis</li> <li>The ITA, training providers and industry will serve as key data sources</li> </ul>
Activities	<ul style="list-style-type: none"> <li>Identify potential sources of primary and secondary data</li> <li>Work with the college system, other training providers, other ITOs, and the ITA in a multi-stakeholder process to design, develop, and implement a coordinated, effective and efficient system for projecting training demand, communicating with apprentices regarding courses, and coordinating and managing course registrations to balance the number of apprentices and spaces</li> <li>Establish mechanisms to obtain input from employer organizations on an on-going basis (e.g. online survey, a telephone survey, and regional meetings)</li> <li>Collect and analyze the information</li> <li>Develop a provincial apprenticeship strategy for its trades.</li> <li>Identify the implications for the recommended annual training purchase plans and the need for initiatives to increase the participation of employers and apprentices</li> </ul>
Timing	<ul style="list-style-type: none"> <li>Annual</li> </ul>
Resource Requirements (People/Other)	<ul style="list-style-type: none"> <li>1 FTE to administer the forecasting system</li> <li>Budget of \$200,000 per year (including staff) for the first two years to cover the costs related to development of a coordinated process for projecting/managing training demand and for development of a provincial apprenticeship strategy for the CITO trades</li> </ul>
Performance Indicators	<ul style="list-style-type: none"> <li>Usefulness of the forecasts (accuracy, reliability and actionability)</li> <li>Costs of implementing the forecasting system</li> </ul>
Performance Tracking	<ul style="list-style-type: none"> <li>Assessment of the forecasts</li> <li>Value of time and other resources committed to the system</li> </ul>

## D. INCREASE EMPLOYER & APPRENTICE PARTICIPATION

### 1. Introduction

One of the proposed functions of CITO is to conduct activities to increase employer and apprentice/training participation in the system. However, the Board of CITO has stressed that the role of the organization is to optimize not necessarily maximize the number of participants. To that end, the mandate of CITO has been



defined as “CITO provides industry leadership in training which results in the right number of workers, with the right knowledge and skills, developed to the right standards, and available at the right time and for the right needs”.

Meeting this mandate will require that CITO be capable of:

- Identifying where shortages exist with respect to the participation of employers and/or apprentices; and
- Implementing appropriate initiatives to address those shortages.

Shortages may be program specific, regional specific, or industry specific. These shortages should be identified as part of the demand forecasting function. Initiatives undertaken to address shortages can include:

- Broad promotional activities such as the development of brochures, mail-outs, and website pages focused on attracting employers and training participants. These broad promotional activities would form part of the on-going communications strategy which is outlined in Section N.
- Research designed to confirm the magnitude of the shortages and define the key factors that contribute to those shortages.
- Targeted initiatives focused on specific programs, regions, industries or target groups (e.g. youth, women or Aboriginal people). These initiatives could include promotional activities or activities designed to increase access to training (e.g. development of alternative technical training models).

Depending upon the nature of the shortage, a wide variety of different promotional strategies can be used. For example:

- Alberta has responded to its major construction boom by aggressively targeting employers and apprentices with a three person team. This team performs outreach to students in schools, counselors and employers. In addition, Alberta has developed extensive print and Internet based communication materials (with the key messaging “Value of the Experience”), newsletters, toll-free numbers, presentations, and the “Trade-Up” CDs which provide an interactive, youth-oriented approach to learning about trade-related careers. Alberta has also recruited young apprentices to speak to high school classes about their experiences through the Youth Ambassador Project. An extensive field staff is available to handle questions.
- Similarly in Saskatchewan, the Youth Apprenticeship program in high school has increased awareness among students. The program gives students an opportunity to gain credits if they spend 100 hours working as a youth apprenticeship coordinator. Staff also make extensive use of brochures, videos and other materials in promoting participation.
- Examples of promotional vehicles in Manitoba include literature, guides, school presentations, relationships with immigration organizations, career fairs, publications, and advertisements. Recognizing that the attractiveness of trades as a career is under-appreciated, Manitoba is placing a particular focus on working with teachers and guidance counselors.
- Nova Scotia has developed a campaign with the key messaging of “it’s a good career” for students and “great value” for employers. It utilizes brochures and presentations to

communicate its goal of value added to workforce.

In late 2006, The ITA launched a new web resource ([www.theskilledlife.com](http://www.theskilledlife.com)) giving BC’s young people an inter-active opportunity to find out more about educational and career opportunities in the trades. The website complements a range of other ITA programs designed to attract youth into the trades, and to provide for smooth transitions from secondary school to apprenticeship.

Other ITOs in BC have undertaken some promotional activities. The go2 Industry Training Division, which was created in 2006 as an arm of go2 (a tourism industry resource for British Columbia), has been promoting apprenticeships through print materials, their web site, and staff. HortEducationBC (HEBC) has relied on word-of-mouth (the size of the horticultural industry is small enough that the program is considered well known), face-to-face meetings, and some advertising in magazines and buyer catalogues. The Residential Construction Industry Organization (RCITO) has devoted some resources to visiting employers and schools; however, they feel it is difficult to gauge the effectiveness of their efforts as the industry is experiencing significant growth. The Resource Training Organization (RTO) does not have a budget for promotion so they have promoted their programs through some face-to-face with employers and schools, encouraging their board to network within industry, and having staff sit on various committees.

In addition to promotional activities, initiatives to increase participation may also include introducing alternative delivery mechanisms. Apprenticeship technical training is largely provided in full-time sessions of six to ten weeks at a post-secondary institute. Recent research has confirmed that such structured approaches can be a barrier to participation for many apprentices and employers, particularly in times of high employment and economic growth as well as in more remote locations. Several alternative delivery mechanisms are being piloted in BC such as:

- *The use of alternative training schedules.* For example, by adding more hours per day, Okanagan College has been able to cut the training week for some programs from five days to four.
- *Delivery of courses online.* A full-scale, online technical training program for the Automotive Collision and Refinishing trade is being offered by Vancouver Community College.
- *Use of mobile training facilities.* A custom designed mobile trailer, which expands into a 1,100 square-foot classroom, will be used to deliver exploratory and apprenticeship technical training. The 53-foot unit accommodates classes of 12 students per session, and features all the necessary equipment and tools, as well as a satellite system to allow for remote instruction. The unit was first used for a two-month trades awareness tour encompassing some 20 remote and aboriginal communities in northern BC.

In short-term, the primary focus will be on achieving the strong, sustainable involvement of employers in the apprenticeship system. Towards that end, a person should be engaged to review the existing research on the opportunities and constraints, conduct further primary or secondary research as required, develop strategies to enhance participation in the short to medium-term, and implement a series of specific initiatives on an annual basis.

**2. Components**

Elements	Description
Objectives	<ul style="list-style-type: none"> <li>• Better balance between supply and demand</li> </ul>

Elements	Description
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Broad promotional activities such as the development of brochures, mailouts, and website pages focused on attracting employers and training participants</li> <li>• Research designed to confirm the magnitude of the shortages and define the key factors that contribute to those shortages</li> <li>• Targeted promotional initiatives focused on specific programs, regions, industries or target groups (e.g. youth, women or Aboriginal people). Examples of targeted initiatives could include:                             <ul style="list-style-type: none"> <li>❑ Direct mail program with targeted materials</li> <li>❑ Outreach teams</li> <li>❑ Newsletters</li> <li>❑ Ambassador programs</li> <li>❑ Targeted materials (CDs, brochures, videos, websites, and other materials)</li> <li>❑ Participation in career fairs</li> <li>❑ Meeting with key groups (associations, immigration organizations, etc)</li> <li>❑ Advertising</li> <li>❑ Networking programs</li> <li>❑ Recognition programs</li> </ul> </li> <li>• Alternative delivery mechanisms (demonstration projects or promotion of alternative delivery mechanisms)</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Employers</li> <li>• Employer Associations</li> <li>• Prospective Apprentices</li> <li>• Inactive Apprentices</li> <li>• High-schools (students, counselors and teachers)</li> <li>• Employment offices</li> <li>• Trainers</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Electronic, mail-outs, advertising, meetings and telephone</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Results of demand forecasting activities</li> <li>• Research into contributing factors</li> <li>• Best practices and lessons learned from past activities</li> <li>• Coordination with other promotional and alternative delivery initiatives</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• CITO staff</li> <li>• Coordinate with employers and employer associations, trainers, ITA and other key stakeholders</li> <li>• Other sources of funding for specialized initiatives</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Review the results of demand forecasts to identify shortages</li> <li>• Conduct research as required to assess the magnitude of the shortage and the actions required</li> <li>• Develop a budget</li> <li>• Access additional funding for promotional and alternative delivery activities</li> <li>• Work collaboratively with ITA, other ITOs and trainers on projects and initiatives</li> <li>• Assess the results</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• Targeted initiatives could be implemented on an annual basis</li> </ul>

Elements	Description
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• 1 FTE</li> <li>• Budget of \$200,000 per year (including staff)</li> <li>• Additional funding could be accessed from Federal Government programs, industry and other sources</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Awareness measures</li> <li>• Activity measures</li> <li>• Number of views</li> <li>• Increase in the number of employers and apprentices participating</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Project tracking (e.g. number of brochures produced and distributed, participation in alternative delivery initiatives)</li> <li>• Follow-up survey of target group members</li> <li>• Data on overall numbers of apprentices and employers participating in CITO trades</li> </ul>

## E. DESIGNATE TRAINING PROVIDERS

### 1. Introduction

As a full-service organization, it was expected that CITO would be responsible for designating (approving) training providers. According to ITA Policy B1104, a Designated Trainer is one that has been approved by the Industry Training Authority Board of Directors to deliver specific programs and is consistent with the ITA “Approval of Non-Public Training Institutions as Designated Trainers” policy. As such, the scope of this function is taken to mean the designation of private (non-public) training providers. As in the other provinces that we reviewed, most of the apprenticeship training in BC (over 90%) is delivery by public institutions.

The private trainer designation process is designed to ensure high standards with respect to facilities, instructor qualifications, curriculum, assessment processes, student support, and general operations. The process is triggered by an application from the training providers. To be approved, private trainers must:

- Demonstrate satisfactory past performance by having delivered one successful intake of the specific program during the ITA designation process or having achieved accreditation through an external accreditation process deemed acceptable by the ITA.
- Meet program-specific quality standards set by industry and approved by ITA (as defined in the program outline).
- Be re-evaluated against current program-specific standards at least every five years. Re-evaluation may occur sooner if there are concerns about the trainer or if there have been significant changes made to the program outline. The ITA will suspend designation in cases where training outcomes are deemed unacceptable or quality standards are not being met.

It should be noted that:

- Designation of a trainer does not necessarily mean that they will receive funding for training. Rather, it simply means that, when a non-public training provider is “designated” to deliver a program by the ITA, successful completion of the program by an apprentice will result in credit toward an ITA Credential.

- Designation does not impact on the ability of students to challenge an exam. Any individual, regardless of how or where they receive their training, will have access to the exam challenge process.
- In the absence of designation by the ITA, a non-public training provider cannot claim that successful completion of a particular program will lead to credits toward an ITA Credential.

It is now expected that the role of CITO will be to assist in the accreditation process and in evaluating the trainer against the program specific quality standards (e.g. facility requirements and faculty credentials/experience). The expectation is that the ITA will continue to lead this process with the primary responsibility of CITO being to recommend subject matter experts. Under this system, the subject matter experts (e.g. semi-retired people) who will receive an honorarium (about \$275 per day) for two to three days work during which they will travel to the facility which has applied for designation, review the operations, and produce a report. The designation service is offered on a direct cost-recovery basis, supported by fees charged to the applicant.

**2. Components**

Elements	Description
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Ensure high standards with respect to facilities, instructor qualifications, curriculum, assessment processes, student support, and general operations</li> <li>• Promote increased access to training seats</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Identification of subject matter experts</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• CITO will link the ITA with suitable subject matter experts who are available and have the capabilities to participate in the evaluation process.</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Referrals to the ITA</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Informal database of subject matter experts (e.g. drawn from those who participated in program development activities)</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• CITO staff who make the referrals</li> <li>• Subject matter experts who are available for referral</li> <li>• ITA staff who lead the evaluation process</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Identification/verification of subject matter experts</li> <li>• Referrals to the ITA</li> <li>• Follow-up with the ITA and the subject matter experts to obtain feedback on the results</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• As requested</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• Depends on the level of involvement of CITO in the process</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Number of referrals made</li> <li>• Satisfaction of ITA and subject matter experts</li> <li>• Performance of private trainers</li> </ul>

Elements	Description
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Tracking of number of referrals</li> <li>• Feedback from ITA and subject matter experts</li> <li>• Data obtained from outcome reports of private trainers</li> </ul>

**F. ANNUAL TRAINING PURCHASE PLAN**

**1. Introduction**

On an annual basis, the ITA enters into contribution agreements with trainer providers that specify the type and scope of training to be delivered. During 2006/07, 16 public training institutes (colleges and university colleges) and 21 private training institutes received ITA funding to provide technical training leading to ITA credentials.

One of the key functions of CITO is to prepare an annual training purchase plan for their assigned programs, through which they make recommendations to the ITA on the allocation of funding for training. Traditionally, the training purchase plans have been developed based primarily on input provided by the trainers regarding the projected number of training spaces that will be filled over the next year. However, the ITA intends to make the planning system more proactive. The new process has not been formally defined. However, a preliminary overview of the possible process is outlined below:

- The ITA will establish and maintain general policy framework regarding the purchase and funding of training
- CITO and other ITOs will participate in an annual ITA planning session to establish the priorities regarding the purchase of training
- The ITA will establish an annual training budget
- CITO will communicate the training priorities and the implications of any changes in budget and the results of it demand forecasts to the public and private institutions which deliver its trades programs
- CITO will work the training institutions to develop a recommended annual training purchase plan for its trades
- The recommended annual training purchase plan is reviewed and approved by the CITO Board and then submitted to the ITA
- The ITA receives and reviews the recommended annual training purchase plans
- The ITA allocates the training budget and enters into Contribution Agreements with the training providers
- The Contribution Agreements are monitored for compliance
- The results of the plan is evaluated

A discussion of the process that CITO could follow in forecasting demand was outlined in Section C while the annual planning session with the ITA is further described in Section K.

Considerable further work needs to be done to develop an appropriate and effective process through which an annual training purchase plan will be developed. Two key issues are:

- The ability of CITO to provide meaningful input into the planning process is dependent upon the strength of the demand forecasting system. In absence of a strong forecasting system that provides CITO with reliable, meaningful data, CITO has no reasonable basis for providing direction or negotiating changes with the training providers. The system, as envisioned, requires that CITO have more than a general trend analysis.



- The development of any forecasting-planning process needs to clearly define how CITO will add value to the planning process. In other words, the rationale for having the ITOs, including CITO, rather than the ITA negotiate with the training providers needs to be clearly defined and reflected in the system design.

**2. Components**

Elements	Description
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Ensure efficient and effective use of resources (high capacity utilization rates)</li> <li>• Achieve balance between supply and demand for training</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Recommended Annual Training Purchase Plan</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Recommendations submitted to the ITA</li> <li>• Used in discussion between the ITA and Training Providers</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Submitted to the ITA</li> <li>• Portions may be posted on the website</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Results of the demand forecasting</li> <li>• Priorities established in the annual planning session with the ITA</li> <li>• Training budget established by the ITA</li> <li>• Input from the training providers</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• ITA staff and Board establish policy and participate in the annual ITA planning session</li> <li>• CITO Executive Director and Chair participate in an annual ITA planning session</li> <li>• CITO staff communicate training priorities and implications of budget changes and demand forecasts to the training providers</li> <li>• CITO staff negotiate training plans with the training providers</li> <li>• CITO Board plan reviews and approves recommended annual training purchase</li> <li>• ITA staff review recommendations, allocate training budget, enter into Contribution Agreements with the training providers, monitor compliance, and prepare annual reports</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Participate in an annual ITA planning session</li> <li>• Communicate training priorities, budget changes, and demand forecasts to training providers</li> <li>• Review training plans submitted by training providers and, where needed, negotiate changes</li> <li>• Compile the results into a recommended annual training purchase for submission to the ITA</li> <li>• Evaluate the result of the plan</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• Annual</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• Estimated at 3 to 5 FTEs, but could vary widely depending upon the process involved</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Acceptance of the recommendations by the ITA</li> <li>• Consistency of the plan with the training priorities</li> <li>• Accuracy of plan in terms of forecast</li> <li>• Capacity utilization for CITO trades</li> </ul>

Elements	Description
<p><b>Performance Tracking</b></p>	<ul style="list-style-type: none"> <li>• Capacity utilization data from the ITA</li> <li>• Assessment of the plan in terms of the acceptance of the recommendations by the ITA, the consistency of the plan with the training priorities, and the accuracy of plan in terms of forecast</li> </ul>

## G. REGISTRATION

### 1. Introduction

The ITA is in the midst of developing a new information technology platform through which apprentices and sponsors will be able to complete registration and other transactions online as well as access key information (e.g. apprentices will be able to access their technical training marks). Upon registration, the ITA will distribute registration cards, welcome letters, and apprentice guides to apprentices and sponsors and process fees. The new system will automate ITA business processes and provide a common platform for ITA website and the development of customized ITO websites. This platform will provide a portal on the CITO website through which apprentices and sponsors can register for its trades. The new system will also facilitate more efficient management of BC’s industry training system, better tracking and reporting of outcomes, and more efficient sharing of documentation throughout the industry training system<sup>2</sup>.

BC appears to be on the leading edge with respect to its use of an online registration and information system. Most of the jurisdictions we contacted still require filling out a joint application signed by both the employer and the apprentice, which is then given to field staff or mailed-in. In many of these jurisdictions, eligibility of the applicants is confirmed through personal contact with the field staff or by phone. Once confirmed, the apprentice is then entered into the registration system. However, some provinces (Alberta, Manitoba, and New Brunswick) are currently looking at a web-based registration system.

Under the original ITA policy, one of the functions of CITO is to register apprentices/trainees in conjunction with the ITA. However, at this point, it appears that the only role envisioned for CITO would be to assist apprentices and sponsors to register for assigned programs via the portal. Furthermore, in most cases, any assistance that will be required will be delivered through help menus online or by calling the ITA customer service centre (the customer service centre is planning to staff up for the release of the new system). It should be noted that several stakeholders expressed concerns that apprentices and sponsors may have difficulties in navigating the new system (particularly small companies who would rarely visit the system and have no in-house human resources department to assist in the process).

It has been suggested that CITO could play a role in confirming information provided by new registrants (e.g. verification of stated work experience), particularly those who may be challenging exams. This is discussed under Section H (Assessments).

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2 The existing Apprenticeship Information Management System (AIMS), which was originally implemented in 1988/89, relies on manual data entry carried out by ITA Customer Service staff and by training institutes and is constrained in its ability to generate customized reports.

**2. Components**

Elements	Description
Objectives	<ul style="list-style-type: none"> <li>Assist apprentices and sponsors in completing the online registration system or in accessing alternative ways to register</li> </ul>
Outputs	<ul style="list-style-type: none"> <li>Assistance to prospective registrants</li> </ul>
Target Groups	<ul style="list-style-type: none"> <li>Apprentices and sponsors</li> </ul>
Distribution of Outputs	<ul style="list-style-type: none"> <li>n/a</li> </ul>
Key Inputs	<ul style="list-style-type: none"> <li>Referrals from the ITA customer service centre</li> </ul>
Participants in the Process	<ul style="list-style-type: none"> <li>CITO staff will provide assistance as required</li> </ul>
Activities	<ul style="list-style-type: none"> <li>Develop a referral protocol with the ITA</li> <li>Provide training and background resources to staff as needed</li> <li>Response to enquiries</li> </ul>
Timing	<ul style="list-style-type: none"> <li>As requested</li> </ul>
Resource Requirements (People/Other)	<ul style="list-style-type: none"> <li>Few referrals are currently expected</li> </ul>
Performance Indicators	<ul style="list-style-type: none"> <li>Number of calls and e-mails received</li> <li>Success rate in addressing the questions received/providing the assistance requested</li> <li>Level of stakeholder satisfaction</li> </ul>
Performance Tracking	<ul style="list-style-type: none"> <li>Track calls, questions, and responses</li> <li>Periodic survey of stakeholders</li> </ul>

**H. APPRENTICE ASSESSMENTS**

**1. Introduction**

According to the ITA policy, CITO will conduct apprentice/trainee assessments in the areas of:

- **Approving credit for prior learning and work experience.** In order to complete a training program, the apprentice is generally required to complete both in-school technical and work-based training. Under certain conditions, the ITA allows apprentices to receive credit for:
  - Prior in-school learning (i.e. the ITA may grant credit for prior learning where it can be demonstrated that the competencies acquired are substantially similar to those covered in the Technical Training. For example, individuals who have been enrolled in a Red Seal program in another Canadian jurisdiction will be granted credit toward the completion of the same program in BC for the levels completed); and
  - Work-based training (i.e. with the concurrence of their current sponsor, an apprentice may

receive credit for their previous relevant practical experience. Alternatively, applicants may receive credit for practical experience by successfully completing a competency-based assessment).

- **Approving eligibility for credential challenge.** Rather than completing the in-school training, apprentices have the option to challenge an exam. Individuals who wish to challenge an exam must demonstrate that they have at least 1.5 times the minimum level of work-based training for that trade. The level of due diligence related to challenge exams seems to vary by province (for example, both Alberta and Nova Scotia noted that they perform due diligence on applicants with experience in other countries which includes calling other countries if needed to verify the claims). It is estimated that there are 2,000 to 3,000 challenges per year across the trades.
- **Conducting practical assessments (where applicable).** At the request of industry, the ITA can approve the administration of practical examinations for a training program. Some jurisdictions and some trades (e.g. mobile crane operators) have moved towards greater use of practical assessments as part of the examination process. Instructors often build some form of practical assessment into the course. Practical assessments are sometimes combined with written examinations for people who are challenging exams to demonstrate that they have both theoretical and practical skills (in Alberta, for example, 10 trades incorporate practical assessments as part of challenge exams). Some common constraints to the use of practical assessments include difficulties in ensuring that the assessments are fair and representative of the overall body of knowledge needed, the feasibility of implementing assessments in some trades, and the potentially high costs of implementation (e.g. the need to hire large numbers of assessors). Based on our discussions to date, we have made the assumption that formal practical assessments will not be widely used within the CITO trades and that, where they are used, the role of CITO will be to refer accredited assessors on a fee payer, cost recovery basis (i.e. no out-of-pocket costs).
- **Assess and report logbook completion/progress (where applicable).** A few of the trades such as welding use log books. For the welding program, about 80 to 170 log books are sent in for assessment and ITA staff put seals in log books to indicate approval. Some provinces, such as Nova Scotia, still make extensive use of log books.

There may also be a role for CITO in confirming the eligibility of new registrants. Other activities related to assessments will be delivered by the ITA including (but not limited to):

- Scheduling level and certification exams for technical training classes, apprentices and challengers
- Recruiting, training, and scheduling contract invigilators
- Preparing and distributing exam booklets, diagram booklets, codebooks and answer sheets for exams sessions
- Marking exams and record results in central system
- Provide exam marks to training providers
- Generating and distributing transcripts to sponsors and apprentices
- Issuing certificates, Red Seal endorsements, wallet cards, and letters of equivalency
- Recording program standards/requirements, technical training results and work based hours in the central information system

At the present time, the ITA has established no formal processes with respect to approving credit for prior learning and work experience, approving eligibility for credential challenge, conducting practical assessments, or assessing and reporting logbook completion/progress. In the absence of clearly defined processes and standards, we cannot confirm whether CITO will simply be responsible for reviewing data reported on applications (e.g. past experience or participation in Red Seal programs in other jurisdictions) and determining whether it meets that stated requirements or will be expected to be much more proactive in

terms of verifying the information provided. Some concern has been expressed that there may be liability, credibility, and public confidence issues associated with not verifying the data provided. Depending upon the level of due diligence, the resource requirements associated with this function could be significant.

**2. Components**

<b>Elements</b>	<b>Description</b>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Implement the policy framework of the ITA with respect to assessments</li> <li>• Maintain public confidence in the apprenticeship systems</li> <li>• Facilitate the delivery of practical assessments</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Due diligence of applications for challenges, credits for past learning and work experience, and approval of log books</li> <li>• Referrals of accredited assessors for practical assessments</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Apprentices/applicants</li> <li>• Training providers</li> <li>• ITA</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Results of due diligence recorded in the online registration system</li> <li>• Approval of applications, credits and Referrals to training providers</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Applications</li> <li>• Research to verify data provider</li> <li>• ITA policy and industry training requirements</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• CITO staff</li> <li>• Accredited assessors</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Work with the ITA to develop formal processes and standards for due diligence</li> <li>• Implement the processes</li> <li>• Facilitate practical assessments (where applicable)</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• As requested</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• Estimated at 3 FTEs. Actual number will vary depending upon the level of due diligence</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Activity measures (number of applications processed, level of due diligence)</li> <li>• Confidence in the system</li> <li>• Perceptions of key stakeholders</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Activity tracking</li> <li>• Survey of stakeholders</li> </ul>

**I. PARTICIPATE IN OR LEAD STRATEGIC INITIATIVES**

**1. Introduction**

It is anticipated that the ITA will periodically undertake key strategic initiatives such as projects designed to increase participation rates in the trades amongst certain target groups such as youth, aboriginal people or females. CITO may be expected to play a role in the implementation of such projects for their trades.

The role of CITO in the implementation of strategic initiatives will vary from project to project. We expect

that if participation by CITO will require the commitment of significant additional resources (financial or human) then those resources will be provided to CITO as part of the overall project costs.

CITO may also play a lead role in some initiatives. Some initiatives that have been suggested as those where CITO might play a lead role include:

- Improving completion rates for apprentices;
- Developing a high school/entry program strategy;
- Increasing the number of employers who train apprentices; and
- Developing a training/productivity framework for apprentices.

**2. Components**

<b>Elements</b>	<b>Description</b>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Participate in/lead strategic initiatives</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Participation or assistance in implementation</li> <li>• Actual outputs will vary by initiative</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• Varies by initiative</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Varies by initiative</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• Varies by initiative</li> <li>• Likely to include the involvement of CITO staff</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Could include planning sessions, stakeholder consultations, delivery of programs and services, performance tracking, and other activities</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• As needed</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• Will vary by initiative</li> <li>• If significant incremental costs are involved, it is assumed that those resources will be provided to CITO as part of the overall project costs</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Initiative specific</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Initiative specific</li> </ul>

**J. ANNUAL ITO SERVICE PLAN**

**1. Introduction**

The Government of BC uses a strategic management approach to ensure effective performance, in part by focusing on results, while providing accountability to the Legislative Assembly and the public. Accountability requires clearly defining goals and objectives, developing the strategies that will be use to achieve those objectives, establishing performance measures and targets to track the progress made, and reporting on the actual results. The Annual Service Plan (prepared at the beginning of the fiscal year) and the Annual Report prepared after the end of the fiscal year are the "bookends" of accountability.



Last year, CITO prepared its first service plan covering the period of 2007-08. The initial service plan established targets strictly for the current year. However, as CITO shifts to full-service delivery, it is anticipated that multi-year targets will be developed for the key performance measures.

Once prepared, the Service Plan is submitted by CITO to the ITA. Once approved by the ITA, the Service Plan (including the performance targets) becomes the basis for a contribution agreement between CITO and the ITA for the following fiscal year.

**2. Components**

<b>Elements</b>	<b>Description</b>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>Define the vision, goals, strategies, measures and targets that will be pursued by CITO</li> <li>Communicate the vision, goals, strategies, measures and targets to key stakeholders</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>Annual Service Plan</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>Direct responsibility to report to ITA and to the Board</li> <li>Broader responsibility to report to key stakeholders (e.g. employer associations, trainers, unions, apprentices, etc.)</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>Service plan are commonly available online through an organization’s website</li> <li>The initial CITO service plan is available through the ITA website</li> <li>Can be supported by paper copies distributed to key targets</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>Input from the Board through strategic planning sessions</li> <li>Input from the ITA through participation in development of the ITA planning sessions and performance measures</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>CITO Board and staff</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>Participate in ITA strategic planning sessions</li> <li>Stage a planning workshop with the CITO Board to define the vision, goals, sector priorities and strategies</li> <li>Establish performance measures and targets which are quantifiable, measurable, reliable and attributable to the activities of CITO</li> <li>Establish targets for each of the performance measures and, where available, suitable benchmarks</li> <li>Define the data sources and methodologies that will be used to track performance against each of the performance measures</li> <li>Write the service plan detailing budget, priorities, goals, measures and targets at the sector level</li> <li>Submit the service plan to the ITA for review</li> <li>Post the approved service plan on the CITO website</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>Annual (target date for completion is November each year)</li> </ul>
<b>Options</b>	<ul style="list-style-type: none"> <li>Contract out</li> <li>Staff generated</li> </ul>

Elements	Description
Resource Requirements (People/Other)	<ul style="list-style-type: none"> <li>Estimated at 0.2 FTE for strategic planning and preparation of the service plan</li> <li>Production costs low if distributed electronically.</li> <li>An initial investment (e.g. \$10,000) could be made to establish a standard format which would be reused for the service plan and annual report in subsequent years.</li> </ul>
Performance Indicators	<ul style="list-style-type: none"> <li>Performance against budget</li> <li>Timeliness of production (e.g. meets deadlines)</li> <li>Level of distribution</li> <li>Perceptions of key stakeholders (e.g. usefulness, content, readability)</li> </ul>
Performance Tracking	<ul style="list-style-type: none"> <li>Distribution tracking (paper, electronic/e-mail, and online downloads)</li> <li>Periodic survey of stakeholders</li> <li>Budget and timeliness</li> </ul>

**K. ITA ANNUAL SERVICE PLAN**

**1. Introduction**

On an annual basis, the ITA develops a service plan which outlines the strategic approach and success measures that will guide the organization’s operations over a three-year period. Given that ITOs will play a key role in the implementation of the service plan, it is anticipated that they will participate in the development of the annual service plan for the ITA. CITO will participate:

- Directly by having the Executive Director and Chair participate in an annual planning session for the ITA.
- Indirectly by developing the CITO service plan which will serve as an input into the development of the ITA service plan.

**2. Components**

Elements	Description
Objectives	<ul style="list-style-type: none"> <li>Provide input into the development of the ITA annual service plan</li> <li>Strengthen coordination and linkages between the ITA and CITO service plans</li> </ul>
Outputs	<ul style="list-style-type: none"> <li>Input into the ITA service plan</li> </ul>
Target Groups	<ul style="list-style-type: none"> <li>ITA</li> </ul>
Distribution of Outputs	<ul style="list-style-type: none"> <li>n/a</li> </ul>
Key Inputs	<ul style="list-style-type: none"> <li>CITO Annual Service Plan</li> </ul>
Participants in the Process	<ul style="list-style-type: none"> <li>CITO Executive Director and Chair participate in annual ITA planning session</li> <li>Board and other CITO staff participate indirectly through communications with Chair and Executive Director and through contributing to development of the CITO service plan</li> </ul>

Elements	Description
Activities	<ul style="list-style-type: none"> <li>Participate in annual ITA planning session</li> <li>Develop and submit the CITO service plan</li> </ul>
Timing	<ul style="list-style-type: none"> <li>Annual (two day planning sessions staged in September, ITA service plan completed in February)</li> </ul>
Resource Requirements (People/Other)	<ul style="list-style-type: none"> <li>Several days time for the CEO and Chair</li> </ul>
Performance Indicators	<ul style="list-style-type: none"> <li>Influence on the ITA service plan (e.g. strategic directions, performance measures, targets)</li> </ul>
Performance Tracking	<ul style="list-style-type: none"> <li>Review of the ITA service plan</li> </ul>

## L. PRODUCE ANNUAL REPORT

### 1. Introduction

CITO is responsible for preparing an annual report on its operations at the end of each fiscal year according to guidelines provided by the ITA. The annual report (along with quarterly reports) must be submitted to the ITA and must include a summary of progress in achieving objectives outlined in the approved Service Plan as well as financial statements. While no formal decisions have been made with respect to the report structure, it is anticipated that the annual report will:

- Report on the progress made by CITO, with a particular focus on the progress made vis-à-vis the key strategic directions and performance indicators outlined in the Service Plan; and
- At a minimum, be targeted at the ITA and CITO Board members but more likely be targeted at the larger stakeholder population served by CITO.

Within this broad context, there could be wide variations in terms of the level of detail, quality of presentation, and level of distribution.

### 2. Components

Elements	Description
Objectives	<ul style="list-style-type: none"> <li>Report on the progress made against the strategic directions and performance indicators outlined in the Service Plan</li> <li>Help to keep key stakeholders informed and engaged</li> </ul>
Outputs	<ul style="list-style-type: none"> <li>Annual report (paper and electronic versions)</li> </ul>
Target Groups	<ul style="list-style-type: none"> <li>Direct responsibility to report to ITA and to the Board</li> <li>Broader responsibility to report to key stakeholders (e.g. employer associations, trainers, unions, apprentices, etc.)</li> </ul>
Distribution of Outputs	<ul style="list-style-type: none"> <li>Annual reports are most commonly distributed online through an organization’s website</li> <li>Can be support by paper copies distributed to key targets</li> </ul>

Elements	Description
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>Tracking systems which generated data to compare performance to key measures</li> <li>Summary of progress against broader strategic performance</li> <li>Notes from the Chair and the CEO</li> <li>Financial data</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>CITO staff and Chair take the lead role in preparing the content</li> <li>May be assisted by contractors, writers and/or publishers who may prepare text, layouts and formats</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>Establish the tracking systems required to collect data related to the key performance measures (define indicators, data sources, methodologies and systems)</li> <li>Collect data on an on-going basis</li> <li>Write the content of the annual report such as                             <ul style="list-style-type: none"> <li>Organization description</li> <li>Activities/progress against key strategic directions</li> <li>Performance measures / results</li> <li>Financial</li> <li>Governance</li> <li>Statistics</li> <li>Notes from the Chair and CEO</li> </ul> </li> <li>Design the format and layout</li> <li>Produce electronic version of the annual report</li> <li>Produce paper copies as needed</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>Annual</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>Estimated at 0.2 FTE for annual report that would be distributed to major stakeholders</li> <li>Minimum production costs if distributed electronically. An initial investment (e.g. \$10,000) could be made to establish a standard format which would be reused in subsequent years.</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>Performance against budget</li> <li>Timeliness of production (e.g. meets deadlines)</li> <li>Level of distribution</li> <li>Perceptions of key stakeholders (e.g. usefulness, content, readability)</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>Distribution tracking (paper, electronic/e-mail, and online downloads)</li> <li>Periodic survey of stakeholders</li> <li>Budget and timeliness</li> </ul>

**M. CONTACT POINT FOR EMPLOYERS AND APPRENTICES**

**1. Introduction**

According to the initial guidelines, ITOs were to serve as the primary point of contact for employers and apprentices for assigned programs. However, it is now recognized that there are significant economies of scale associated with maintaining a centralized contact management function (i.e. centralizing operation of the call centre, e-mail response systems, and website). As a result, the ITA now plans to maintain its customer service centre rather than devolving responsibility for this function to the ITOs. Under a centralized system, ITOs would not serve as the primary point of contact but rather would serve as a

secondary source of support to which the ITA would occasionally refer employers or apprentices when necessary. The results of our preliminary interviews indicate that:

- The ITA currently has 9 customer service representatives answering about 6,500 calls per month. The client service functions were formerly carried out on a contractual basis by Service BC staff.
- The new website will be able to answer most of the questions posed by apprentices and employers. When launched, the new website may lead to a short-term increase in the number of calls but the ITA anticipates that it will significantly reduce the number of questions from apprentices or employers over time. The ITA call centre will routinely refer callers to the website for information.
- There is currently no resource database/manual available to assist the customer service representatives answer questions. However, it is estimated that 90% of inquires can already be answered off the Internet. By next year, the customer service representatives will have access to an intranet with program specific information and updates.
- The ITA currently receives from 20 to 60 e-mail enquires through the website per day. The average response time is 2 days.

The results of our interviews with other jurisdictions indicate that most are now positioning the website as the main communication vehicle with the objective of reducing the number of calls and e-mails received. Our interviews with other ITOs indicate that relatively few apprentices or employers are being referred to ITOs for answers. However, some concerns were expressed by various stakeholders who were interviewed as well as in the industry consultation sessions about the quality of responses currently being provided by the ITA.

**2. Components**

<b>Elements</b>	<b>Description</b>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Provide a secondary source of information for questions which cannot be answered by the ITA website or through the call centre</li> <li>• Provide input as needed to enhance the effectiveness of the website and call centre</li> <li>• Ensure that the stakeholders are well served by the system</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Responses to questions</li> <li>• Improvement to the system</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Primary focus is employers and apprentices</li> <li>• Questions may also come from other stakeholders</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• By telephone or e-mail</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Knowledge of the program, training locations, program requirements and other key topics</li> </ul>
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• CITO staff</li> </ul>

Elements	Description
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Provide input, feedback, and additional information to enhance the ability of the website and call centre to directly address employer and apprentice questions</li> <li>• Refer employers and apprentices to the website and call centre</li> <li>• Receive referrals from the ITA on key questions which cannot currently be answered by the website or customer service representatives</li> </ul>
<b>Timing</b>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>
<b>Resource Requirements (People/Other)</b>	<ul style="list-style-type: none"> <li>• Small number of calls/e-mails per month assuming that the website and call centre are well-positioned and effective in their roles as a first point of contact</li> <li>• Some assistance and training support may be provided to call centre staff</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Number of calls and e-mails received by ITA and by CITO</li> <li>• Success rate in addressing the questions received</li> <li>• Level of stakeholder satisfaction</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Track calls, questions, and responses</li> <li>• Periodic survey of stakeholders (the ITA and BC Stats conduct an annual survey of stakeholders to determine levels of stakeholder awareness and customer satisfaction with respect to topics such as technical training, work-based training and customer service)</li> </ul>

## N. COMMUNICATION STRATEGY

### 1. Introduction

While not one of the functions specifically identified by the ITA, development and implementation of a Communications Strategy will be key to CITO’s eventual success in achieving many of its core functions. The Communication Strategy will focus on proactive communications from CITO to key target groups including:

- Customers (apprentices and employers);
- Stakeholders (e.g. the Board of Directors, industry, ITA, labour, government, joint boards, training institutions); and
- Media (including the general, industry-specific and business media) as an avenue to reach the first two groups.

There has been limited trades-related communications activity in BC historically, so it is anticipated that CITO’s communications will be noticed and viewed positively. Similarly, although improving, communications programs implemented by trades training organizations in other provinces generally have not been very sophisticated. Across the country, budgets range from nothing (where the required monies are taken from other budgeted items) to approximately \$500,000. A wide range of materials have been created across the country to promote trades careers and training ranging from printed materials such as brochures, playing cards, posters, manuals and annual reports to more elaborate, interactive ideas featuring advertising, videos and detailed websites. Messaging tends to focus on creating general awareness of trades as a career option, which will largely remain the responsibility of the ITA. Some jurisdictions have begun targeting apprentices, journeypersons and employers in specific sectors about the importance of investing the time, money and energy into trades training as a means to improve the workforce.



The primary objectives of the Communication Strategy for CITO will be to:

- Create awareness of CITO;
- Create a mechanism whereby CITO can learn and share information directly with customers around the province;
- Position CITO as a principal resource in British Columbia for ICI (Industrial, Commercial, and Institutional) construction trades training; and
- Build awareness of, and traffic to, the CITO website as a primary resource and interactive location for customers.

Within these broad objectives, the initial goals of the Communication Strategy will be to identify CITO's core values, develop the corporate identity for CITO, design communications materials, build programs to increase awareness with customers and stakeholders, create a media profile to position CITO as an expert source on trades training and industry-specific issues, and provide regular messaging about organization's operations. Each of these goals is further described below:

- **Identify CITO's core values.** Identifying and focusing on a few central ideas that demonstrate the organization's uniqueness will guide the creation of all subsequent communications materials. Focusing on core values is a key component in developing an effective strategy that will build awareness and support for the new organization. The Board of Directors have defined the core values for CITO operations to be:
  - Customer-focused (apprentices and employers);
  - Innovative, with the fullest possible utilization of best practices and emerging technology;
  - Inclusive, with due consideration given to the views of all participants in the ICI construction sector and of the broader stakeholder community; and
  - Transparent, with clear accountabilities and disclosures regarding performance measures.
- **Develop CITO's corporate identity.** When creating a corporate identity, an organization needs to consider how its core values can be reflected in the look and feel of all its Communication materials and points of contact, both internally and externally. An organization must be aware that its core values need to inform all of its communications. From business cards and letterhead to brochures and annual reports, these values must be reflected to ensure that the audience has the same experience each time it contacts the organization. Clearly defining the corporate identity will simplify communications because all decisions will be guided by its framework.
- **Design communications materials, including the website, that align with the organization's corporate identity and core values.** As noted above, the key to a successful Communications strategy is to present a focused and consistent message to customers across all points of contact that aligns with the organization's identity and values. Initially, CITO will not require a lot of different communication materials. However, a signature brochure that outlines the CITO story, along with a comprehensive and functional website, will be key to creating and sharing a positive interaction with customers, stakeholders and the media.
- **Build programs to increase CITO's awareness with customers and stakeholders.** As a new organization, CITO must create awareness of itself beyond its current stakeholder groups to reach its wider customer base. Explaining the organization's role, its implementation, features and benefits are paramount in showcasing its value and highlighting its purpose. Given the change that has taken place the trades training system in BC over the years, CITO needs to be seen as a welcome addition to this field that can assist customers in their personal and business development.

- **Create a media profile for CITO's leadership as an expert source on trades training and industry-specific issues.** Positioning CITO's CEO as an expert in trades training and the construction trades will build awareness and support for the organization when the media are looking for informed sources to comment on current topics. The more exposure that an organization has through this type of activity, the more awareness and credibility it has with its target customers and the larger stakeholder community too.
- **Provide regular messaging about organization's operations.** By planning regular and consistent communications, CITO can create a culture of activity that helps reinforce its values as an organization that is developing and supporting its customers.

Three key steps that CITO will need to undertake in the near future are to create the corporate identity; create a launch plan; and develop a signature communication piece. Each of these steps is described below:

#### ***Create CITO's corporate identity***

- Working with a designer, CITO leadership and selected stakeholders can define the organization's look and feel based on its core values that will be reflected in all points of contact.
- Corporate identity elements should be shared with Board for review and input prior to implementation
- Approximate cost: \$5,000 to \$10,000

#### ***Create a launch plan to announce formally and broadly to customers and stakeholders around the province that CITO is operating***

- Draft points covering the key successes of the organization's first year and its plans going forward
- Create a noteworthy event, or speaking engagement that signals the ceremonial launch of CITO
- Present forward looking industry information to position CITO as a sector resource
- Prepare coincident provincial advertising program to reach stakeholders
- Plan regional tour of presentations with industry associations and/or community speaking opportunities coincident with the launch
- Concept should be shared with committee for review before execution
- Approximate cost: \$20,000 to \$50,000

#### ***Develop a signature communication piece***

- Create an informative brochure that outlines the CITO story and points customers to the website to learn more about the services offered.
- Brochure needs to reflect the corporate identity and must be transferable to other CITO points of contact like the website, and trade show booth as they are developed
- The brochure needs to be designed to appeal to the customer audiences
- Concept should be shared with committee for review before production
- Approximate cost: \$4,000 to \$12,000

**2. Components**

Elements	Description
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Create awareness of CITO</li> <li>• Create a mechanism whereby CITO can learn and share information directly with customers around the province</li> <li>• Position CITO as the principal resource in British Columbia for ICI (Industrial, Commercial, and Institutional) construction trades training</li> <li>• Build awareness of, and traffic to, the CITO website as the primary resource and interactive location for customers</li> </ul>
<b>Initial Goals</b>	<ul style="list-style-type: none"> <li>• Identify CITO's core values</li> <li>• Develop CITO's corporate identity</li> <li>• Design communications materials, including the website, that align with the organization's corporate identity and core values</li> <li>• Build programs to increase CITO's awareness with customers and stakeholders</li> <li>• Create a media profile for CITO's leadership as an expert source on trades training and industry-specific issues</li> <li>• Provide regular messaging about organization's operations</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Customers: apprentices and employers</li> <li>• Stakeholders: board of directors, industry, ITA, labour, government, joint boards, training institutions</li> <li>• General, industry-specific and business media as an avenue to reach the first two groups</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• A corporate identity that includes the images and design elements that best represent CITO to itself and customers</li> <li>• A consultation mechanism (outlined in Section B) that allows CITO to learn and share information with customers in different provincial regions</li> <li>• A promotional piece that showcases the organization, its story, function and objectives</li> <li>• An annual calendar of communications activities and timing</li> <li>• Regular media releases, stakeholder updates, service plans and annual reports that highlight the activities and programs that CITO is implementing</li> <li>• Targeted advertising</li> <li>• Target promotional initiatives and activities focused on attracting employer and training participants focused on specific programs, region, industries or target groups</li> </ul>
<b>Distribution of Outputs</b>	<ul style="list-style-type: none"> <li>• All internal and external contacts</li> <li>• Regular meetings with regional industry associations</li> <li>• To key stakeholders and at meetings, lectures, trade shows and at other live events, as well as in response to inquiries</li> <li>• CITO management, the Board and select ITA management</li> <li>• To contacts within industry and business media, along with key stakeholders</li> <li>• In specific industry and trade publications</li> </ul>
<b>Key Inputs</b>	<ul style="list-style-type: none"> <li>• Organization's core values</li> <li>• Communications staff (either internal and/or external)</li> <li>• Communications funds as a designated budget</li> <li>• Research with customers around awareness and issues including current trades training resources, their functionality, responsiveness, value, etc.</li> </ul>

Elements	Description
<b>Participants in the Process</b>	<ul style="list-style-type: none"> <li>• CITO Communications resources (staff, consultant, and/or agency)</li> <li>• CITO management</li> <li>• Board and ITA partners</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Engage CITO Communications resources</li> <li>• Develop core values</li> <li>• Define CITO’s corporate identity, its look and feel</li> <li>• Prepare launch program</li> <li>• Develop signature communication piece.</li> <li>• Create annual calendar</li> <li>• CITO launch event</li> <li>• Develop baseline market research</li> <li>• Develop supporting activities throughout year</li> </ul>
<b>Timing</b>	<p><i>Short-term (0-2 months)</i></p> <ul style="list-style-type: none"> <li>• Engage CITO Communications resources</li> <li>• Draft core values</li> <li>• Define CITO’s corporate identity, its look and feel</li> <li>• Prepare launch program</li> </ul> <p><i>Mid-term (3-6 months)</i></p> <ul style="list-style-type: none"> <li>• Develop signature communication piece</li> <li>• Create annual calendar</li> <li>• CITO launch event</li> </ul> <p><i>Long term (&gt;6 months)</i></p> <ul style="list-style-type: none"> <li>• Develop baseline market research</li> <li>• Develop supporting activities throughout year</li> </ul>
<b>Performance Indicators</b>	<ul style="list-style-type: none"> <li>• Activity measures</li> <li>• Distribution measures/views</li> <li>• Awareness of CITO</li> <li>• Traffic to the CITO website</li> <li>• Earned media coverage</li> <li>• Achievement of objectives for specific campaigns</li> </ul>
<b>Performance Tracking</b>	<ul style="list-style-type: none"> <li>• Activity tracking</li> <li>• Survey of stakeholders</li> <li>• Website activity</li> </ul>

## O. CONSULTATION STRATEGY

As part of its duties, CITO is expected to consult with key stakeholders with an interest in the assigned training programs. Processes will need to be in place that enable CITO to seek input from a broad range of stakeholders (which may include but not be limited to employers, apprentices, and representatives from labour and training providers):

- In the development of its annual plans; and
- On specific issues such as substantive modifications to programs which are being considered.

The feedback received during this project indicates that an innovative and proactive approach to solicit input will be welcomed by industry partners. Stakeholders note that, in the past, they have not often been

given the opportunity to voice their opinions. Where input has been sought in the past by other organizations, it has generally been handled more indirectly via mechanisms such as mail surveys or small focus groups. No other jurisdiction which we reviewed undertakes formal, on-going stakeholder consultation at this time on these issues. Some locations do not engage their regions at all, while others use existing field staff to gather information on an informal basis.

The primary objectives of the Consultation Strategy are to:

- Create mechanisms that permit CITO to seek customer input on a regular basis to its broader activities and plans as well as on specific issues.
- Ensure that the needs of industry are addressed through a process that gives it a direct voice.
- Create a profile for CITO and its leadership with regional industry-specific communities.
- Create a timetable of meetings and interactions to focus the planning and dialogue.
- Define parameters that allow participants to interact with the consultation process but manage its time and expense.

Within these broad objectives, the initial goals of the Consultation Strategy are to:

- **Create a structure for sharing CITO's annual plans with, and soliciting input from, industry that is manageable and welcomed.** To capitalize on its industry partnership, CITO wants to involve stakeholders and their ideas in the broader process of reviewing and refining the organization's activities and priorities. By creating an annual work plan to share with industry associations, CITO will set its own agenda but also seek and incorporate the participation of regional industry representatives to confirm and hone plans and programs that address industry needs in a direct and timely manner. As awareness of this process increases, industry will notice and welcome the opportunity to contribute, provided that the feedback received and the actions resulting from it are well-shared and communicated.
- **Plan, promote and conduct consultation meetings with regional associations around the province on a planned calendar.** By being proactive and direct, CITO can impress the regional stakeholders with its commitment to this form of interaction and process improvement. Regularly visiting the regions will also create opportunities to raise awareness of the organization within the business, media and education communities and how its efforts will generate positive impacts for employers, apprentices, the industry and the economy.
- **Create a structure for consulting with industry on any substantive modifications to programs in a manageable and as needed basis.** In addition to obtaining input for the development of the annual plans, an ad hoc consultation process will be required to obtain input on proposed changes to program standards. The process will vary depending upon the nature of the changes and the groups affected. Options may include soliciting input from regional associations or groups, coordinating and hold open meetings with regional representatives to share information and seek input, and/or stakeholder surveys administered online or by telephone.
- **Encourage as much participation as possible, but set up reasonable measures to manage involvement.** It is important to value the time provided by stakeholders and to carefully balance the value of the information collected with the costs of collecting that information (including the costs of setting up and staging meetings or conducting surveys).
- **Demonstrate commitment to the process by acting on the feedback received and ensuring that participants are aware of the actions taken.** Over time, the success of the communication program will require positive word-of-mouth generated by the participants in their communities. Participants need to understand and notice that their contributions are being heard and acted upon.

The ideas presented in the regional sessions need to be captured, collated and available for review and comment (which could be facilitated through a designated Consultation section on the CITO website). In addition, other mechanisms such as a semi-annual electronic newsletter could be developed and distributed to showcase the learning and changes that have resulted from the process, thereby increasing awareness, credibility and future participation.

Three key steps that CITO will need to undertake in the near future are to:

***Design a series of face-to-face meetings to consult with employers around the province on annual basis.***

The process can build on the results of the 10 consultation sessions undertaken as part of this project to review the organizational model proposed for CITO. One option would be to stage a series of four sessions annually (i.e. one on Vancouver Island, one in the Lower Mainland, one in the Southern Interior and one in the Northern Interior) with the specific locations of the meeting rotating across communities from year to year. The initial consultation sessions were promoted by:

- Developing a population list of employers and other target stakeholders located in the region. Names were compiled from lists provided by various associations as well as listings obtained through the Internet.
- Booking a facility for each session.
- Developing an invitation letter for distribution to the employers and stakeholders.
- Notifying local associations and other key people who can get the word out in the region.
- Issuing media releases and following-up to generate media coverage (sessions received both radio and newspaper coverage).
- Distributing the letter to the population list.
- Calling potential participants to invite them to attend by telephone. Speaking directly with representatives proved to be the most effective means to recruit participants.
- Sending reminders to participants. Asking representatives to pre-register enabled us to estimate the number of people who would attend as well as distribute e-mail reminders.

Approximately one person-week of phone calling is required per session. Sessions also involve additional costs related to meeting space, equipment, food and beverages and travel costs. The typical budget would be about \$2,500 to \$5,000 per session.

***Design an ad hoc consultation process that addresses specific substantial modifications to program standards as they arise.***

The process will vary depending upon the nature of the changes and the groups affected. Options may include soliciting input from regional associations, coordinating and hold open meetings with regional representatives to share information and seek input, and/or surveys administered online or by telephone. The cost of the process may vary from time-only cost associated with obtaining informal input to \$6,000 to \$8,000 for a series of regional meetings to \$25,000 for a significant survey of the sector affected by the changes.

***Commit to, and build a process to collect and incorporate the feedback that is generated from these sessions.***

Consultations will not succeed or develop if participants do not understand the direct link from their input to changes in the programs or process. Some of the options are to:

- Distribute a mid-year newsletter update electronically that incorporates the meetings input and



outcomes from the regions.

- Use the website as the primary location to view and comment on information and the process between face to face meetings. CITO’s CEO can be positioned as the primary contact point for this discussion to lend it the appropriate distinction, but internally processes can be designed to minimize the day-to-day impact of this information to allow the CEO to continue to focus on other organizational issues. Posting updated plans, providing links to participant submissions, and allowing interactive comments will assist in this process.
  
- Summarize the key discussions from the previous year and the changes that occurred because of it at each new consultation session, to demonstrate CITO’s commitment and the on-going nature of its dialogue with industry.

The approximate cost of providing feedback is estimated at about \$3,000 to \$6,000 annually.

**2. Components**

Elements	Description
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Create a mechanism that permits CITO to seek customer input on its broader activities and plans as well as on specific issues</li> <li>• Ensure that the needs of industry are addressed through a process that gives it a direct voice in this new training model</li> <li>• Create a profile for CITO and its leadership with regional industry-specific communities</li> <li>• Create a timetable of meetings and interactions to focus the planning and dialogue</li> <li>• Define parameters that allow participants to interact with the consultation process but manage its time and expense</li> </ul>
<b>Initial Goals</b>	<ul style="list-style-type: none"> <li>• Create a structure for sharing CITO’s plans to, and soliciting input from, industry that is manageable and welcomed</li> <li>• Plan, promote and conduct consultation meetings with regional associations around province on a planned calendar</li> <li>• Encourage as much participation as possible, but set up reasonable measures to manage involvement</li> <li>• Demonstrate commitment to the process by acting on the feedback and ensuring that participants are aware of these actions</li> <li>• Establish a direct dialogue with industry to support and learn from them about trades training issues and priorities</li> </ul>
<b>Target Groups</b>	<ul style="list-style-type: none"> <li>• Primary: industry associations, employers</li> <li>• Secondary: Board of Directors, ITA, government, post-secondary training institutions and apprentices</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Feedback from annual plan presentations and subsequent discussions with regional industry association members and non-members</li> <li>• Information about developing issues and trends that CITO needs to be aware of and manage going forward</li> <li>• A more complete plan for, and solution to, the challenges that CITO is facing</li> <li>• The development of a cooperative and trusting relationship with industry and stakeholders that ultimately benefits all apprentices</li> </ul>

Elements	Description
<p><b>Distribution of Outputs</b></p>	<ul style="list-style-type: none"> <li>• Directly to CITO and back to its customers and stakeholders through program changes and Communications activity</li> <li>• Key stakeholders in the regions will be engaged to relay information to their constituents</li> <li>• Through materials provided directly to CITO stakeholders</li> <li>• Through meetings, lectures, trade shows, media and on-going Communications programs including the CITO website</li> </ul>
<p><b>Key Inputs</b></p>	<ul style="list-style-type: none"> <li>• An annual CITO work plan that can be presented at regional industry association meetings</li> <li>• Dialogue with industry about CITO's plans and processes</li> <li>• A designated budget to fund the planning of, and participation in, these regional meetings</li> </ul>
<p><b>Participants in the Process</b></p>	<ul style="list-style-type: none"> <li>• CITO management</li> <li>• Stakeholder groups</li> <li>• Invited Board and ITA guests</li> </ul>
<p><b>Activities</b></p>	<ul style="list-style-type: none"> <li>• Prepare annual work plan for presentation to regional construction associations</li> <li>• Plan annual consultation meeting calendar</li> <li>• Coordinate consultation schedule and venues with associations</li> <li>• Inform regional stakeholders of how people can become involved in the proceedings and offer input via the website</li> <li>• Enlist support of various stakeholder groups to inform their membership about the meetings and invite participation from interested local parties</li> <li>• Post materials to be reviewed in advance on CITO's website</li> <li>• Conduct the meetings allowing participation and discussion from all pre-registered parties</li> <li>• Collect and analyze information gathered from each meeting and its participants</li> <li>• Update and/or amend plans and programs accordingly based on feedback</li> <li>• Report implementation and progress back to associations and other stakeholders in a mid-year electronic newsletter</li> <li>• Plan for the subsequent year's meetings being sure to include updates of the prior year's feedback and actions that came about from it</li> </ul>

Elements	Description
<p style="text-align: center;"><b>Timing</b></p>	<p><i>Short-term (0-2 months)</i></p> <ul style="list-style-type: none"> <li>• Prepare annual work plan for presentation to regional stakeholder groups</li> <li>• Plan annual meeting calendar</li> <li>• Coordinate schedules and venues with associations</li> </ul> <p><i>Mid-term (3-6 months)</i></p> <ul style="list-style-type: none"> <li>• Inform stakeholders of how people can get involved in the discussion and offer input via the website</li> <li>• Enlist support of key stakeholder groups</li> <li>• Generate media coverage</li> <li>• Post materials to be reviewed in advance on CITO website</li> <li>• Conduct the meetings allowing participation and discussion from all parties who pre-registered</li> </ul> <p><i>Long term (&gt;6 months)</i></p> <ul style="list-style-type: none"> <li>• Collect and analyze information gathered from each meeting and its participants</li> <li>• Update or amend plans and programs as appropriate based in prevailing messages of feedback</li> <li>• Report implementation and progress back to associations and other stakeholders in an electronic newsletter</li> <li>• Plan for the subsequent year’s meetings being sure to include updates of the prior year’s feedback and actions that came about from it</li> </ul>
<p style="text-align: center;"><b>Performance Indicators</b></p>	<ul style="list-style-type: none"> <li>• Participation levels</li> <li>• Evidence of action taken based on input received</li> <li>• Level of industry support for plans, activities and specific initiatives or changes</li> <li>• Level of industry satisfaction with CITO</li> </ul>
<p style="text-align: center;"><b>Performance Tracking</b></p>	<ul style="list-style-type: none"> <li>• Tracking of participation levels</li> <li>• Review of process/examples of how input was used</li> <li>• Annual ITA awareness/satisfaction survey</li> </ul>

## IV. RESOURCE REQUIREMENTS AND IMPLEMENTATION PLAN

This chapter provides a summary of the operating model, defines the resource requirements, and outlines the implementation plan and performance measures.

### A. ORGANIZATIONAL STRUCTURE AND STAFFING

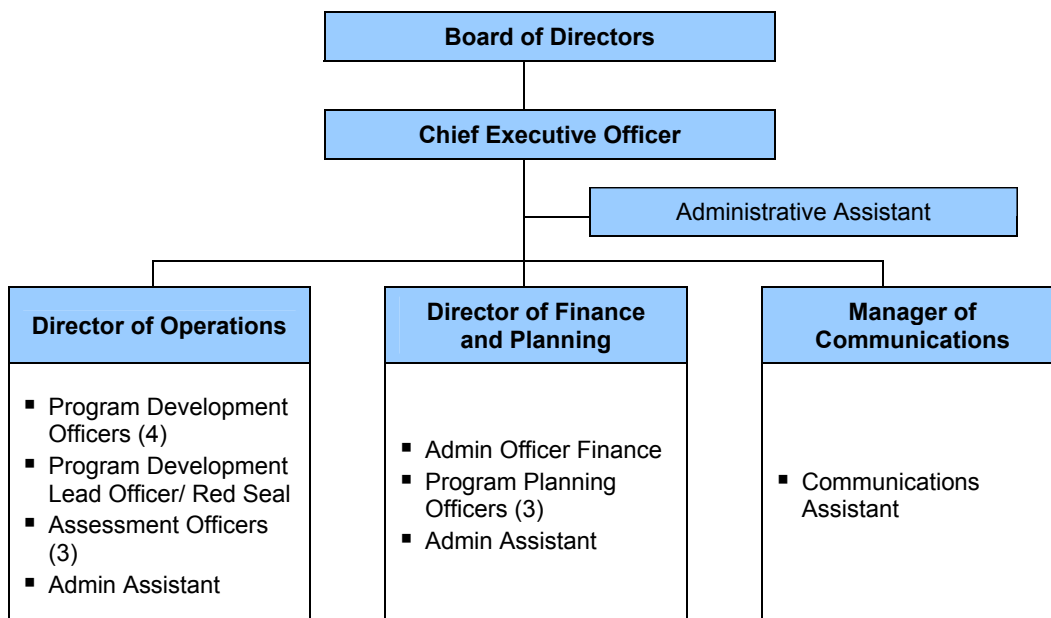
The table beginning on the following page provides a summary of the functions as outlined in this report. For each function, the table outlines:

- The primary focus or objective of the function;
- The key activities or process that may be involved in the function;
- The estimated number of staff who will be needed to deliver this function.

As indicated in the table, we estimate that CITO will require a staff of 20 to fulfil all these functions as defined. The most significant activities in terms of the level of resources required will be program development, assessments, and preparation of the annual training plan. Functions for which no staff resources are listed do not require dedicated staff but rather will be undertaken by management or staff listed in other categories on an as-needed basis.

Reflecting these functions, we have developed a proposed organizational structure. As indicated below, the activities of CITO will be implemented under the direction of three group managers including the Director of Operations, the Director and Finance and Planning, and the Manager of Communications who in turn report to the Chief Executive Officer.

#### PROPOSED ORGANIZATIONAL STRUCTURE FOR CITO



SUMMARY OF FUNCTIONS

Function	Focus or Objectives	Planned Activities	Staff
<b>Core Service Delivery Functions</b>			
<b>Program Development</b>	<ul style="list-style-type: none"> <li>Maintain the high quality of training programs for all trades</li> <li>Process applications for new programs</li> <li>Maintain up to date program standards, outlines and descriptions for all trades</li> <li>Create awareness of new and updated program standards, outlines and descriptions</li> <li>Operate within the established ITA policy framework</li> </ul>	<ul style="list-style-type: none"> <li>CITO receives new program proposals, assesses proposals against established guidelines and criteria, and makes recommendations to CITO board and ITA regarding approval. On approval, CITO leads development of program activities and assessment tools</li> <li>To update existing programs, CITO convenes a Governance Committee, recruits Subject Matter Experts (SME), prepares program description and outline profiles, and guides the program through the approval process</li> <li>On approval of program updates, staff recruit and convene new SME exam committee, develop materials, conduct an exam workshop, and undertake field testing</li> <li>The launch process for new and updated programs may include joint communication with ITA, website updates, and, if issues arise, further communication</li> </ul>	4
<b>Red Seal Product Development</b>	<ul style="list-style-type: none"> <li>Assist the ITA in meeting its requirements in the Red Seal Program</li> </ul>	<ul style="list-style-type: none"> <li>For the trades where BC is the host province, CITO recommends industry representatives, faculty and facilitators who will participate in the process, leads the provincial review of the National Occupational Analyses (NOA), develops the Table of Specifications (TOS) for its trades, responds to feedback from other regions, and participates in the exam development process</li> <li>For the trades where BC is not the host province, CITO (or its designate) attends inter-provincial SME meetings and workshops, recommends industry representatives, faculty and facilitators to participate in the NOA and exam development process, leads the provincial review of the NOAs for its trades, and reviews the TOS prepared by other host jurisdictions</li> </ul>	1
<b>Demand Forecasting for Assigned Programs</b>	<ul style="list-style-type: none"> <li>Develop an efficient and effective system for forecasting demand and matching apprentices with spaces</li> <li>Determine the demand for training for use in the development of annual training purchase plans and in determining where CITO should focus on increasing the participation of employers and apprentices</li> </ul>	<ul style="list-style-type: none"> <li>CITO will work with the college system, other training providers, other ITOs, and the ITA in a multi-stakeholder process to design, develop, and implement a coordinated, effective and efficient system for projecting training demand, communicating with apprentices regarding courses, and coordinating and managing course registrations to appropriately balance the number of apprentices and training spaces</li> <li>CITO will focus primarily on shorter-term demand, relying on secondary sources of information and input obtained from industry on an on-going basis to identify medium to longer-term trends</li> <li>Once an appropriate forecasting system is in place, CITO will consider development of a provincial apprenticeship strategy for its trades to better coordinate promotional activities, entry level training (including high school programs), and apprenticeship training with industry demand and workforce requirements</li> </ul>	1

Function	Focus or Objectives	Planned Activities	Staff
<b>Annual Training Purchase Plan</b>	<ul style="list-style-type: none"> <li>A key function of ITOs is to prepare an annual training purchase plan for their assigned programs, through which they make recommendations to the ITA on the allocation of funding for training</li> <li>The objectives are to ensure efficient and effective use of resources (e.g. high capacity utilization rates) and achieve an appropriate balance between supply and demand for training</li> </ul>	<ul style="list-style-type: none"> <li>At the very least, CITO will: (1) participate in the annual ITA planning session which will identify priorities related to training for the coming year; (2) work with the training providers individually or as a group to discuss training priorities, the implications of budget changes, and available demand forecast information; (3) review training plans submitted by training providers and, where needed, discuss and/or negotiate possible changes; and (4) compile the results into a recommended annual training purchase for submission to the ITA</li> <li>The ability of CITO to provide meaningful input into the planning process is dependent upon the strength of the demand forecasting system (i.e. described in the previous function). In absence of a strong forecasting system that provides CITO with reliable, meaningful data, CITO has no reasonable basis for providing direction or negotiating changes with the training providers. The system, as envisioned, requires that CITO have more than a general trend analysis. The staffing requirements will depend on the system that is ultimately developed</li> </ul>	2.5
<b>Increase Employer and Apprenticeship Participation</b>	<ul style="list-style-type: none"> <li>Increase the participation of employers and/or apprentices in the system as needed to better balance between supply and demand</li> </ul>	<ul style="list-style-type: none"> <li>CITO: (1) reviews demand forecasts to identify shortages and assess the magnitude of the shortage; (2) conducts research as needed to confirm the magnitude of the shortages and define the key factors that contribute to those shortages; (3) determines the actions required and develops a budget; (4) where available, accesses other funding available; (5) implements targeted initiatives focused on specific programs, regions, industries or target groups (e.g. youth, women or Aboriginal people). These initiatives could include promotional activities or activities designed to increase access to training (e.g. development of alternative technical training models); and (6) assesses the results</li> </ul>	.5
<b>Designate Training Providers</b>	<ul style="list-style-type: none"> <li>Ensure high standards with respect to facilities, instructor qualifications, curriculum, assessment processes, student support, and general operations</li> </ul>	<ul style="list-style-type: none"> <li>It is now expected that the role of CITO will be to assist in the accreditation process and in evaluating the trainer against program specific quality standards. The ITA will continue to lead this process with the primary responsibility of CITO being to recommend subject matter experts</li> </ul>	-
<b>Contact Point for Employers and Apprentices</b>	<ul style="list-style-type: none"> <li>Provide a secondary source of information for questions which cannot be answered by the ITA website or through the call centre</li> <li>Provide input as needed to enhance the effectiveness of the website and call centre</li> </ul>	<ul style="list-style-type: none"> <li>The ITA plans to maintain its customer service centre rather than devolving responsibility for this function to the ITOs</li> <li>CITO will provide input, feedback, and additional information to enhance the ability of the website and call centre to directly address employer and apprentice questions</li> <li>CITO will receive referrals from the ITA on key questions which cannot be answered by the website or by customer service representatives. No estimates are available on the number of calls but the volume is expected to be low</li> </ul>	0.2



Function	Focus or Objectives	Planned Activities	Staff
Registration	<ul style="list-style-type: none"> <li>Assist apprentices and sponsors in completing the online registration system or in accessing alternative ways to register</li> </ul>	<ul style="list-style-type: none"> <li>The ITA is moving to an online registration system. This CITO website will serve as a portal through which apprentices and sponsors can register for its trades</li> <li>The only role envisioned for CITO would be to assist apprentices and sponsors to register for assigned programs via the portal. In most cases, any necessary assistance will be delivered through help menus online or by calling the ITA customer service centre</li> </ul>	0.2
Assessments	<ul style="list-style-type: none"> <li>Implement the policy framework of the ITA with respect to assessments, and facilitate the delivery of practical assessments</li> </ul>	<ul style="list-style-type: none"> <li>CITO will conduct apprentice/trainee assessments in the areas of: (1) approving credit for prior learning and work experience; (2) approving eligibility for credential challenges; (3) conducting practical assessments (where applicable); and (4) assessing and report logbook completion/progress (where applicable). There may also be a role for CITO in confirming the eligibility of new registrants</li> <li>At the present time, there are no formal standards or processes with respect to conducting assessments and approving credits or eligibility for challenges. Processes could range from simply reviewing data reported on applications to being much more proactive in terms of verifying the information provided. Some concern has been expressed that there may be liability, credibility, and public confidence issues associated with not verifying the data provided. Depending upon the level of due diligence, the resource requirements associated with this function could be significant</li> <li>CITO will work with the ITA to develop formal processes and standards for due diligence, implement the processes, and facilitate practical assessments (where applicable)</li> </ul>	3
<b>External Support Functions</b>			
Communication	<ul style="list-style-type: none"> <li>The primary objectives of the Communication Strategy are to create awareness of CITO, create a mechanism whereby CITO can learn and share information directly with customers around the province, position CITO as the principal resource in British Columbia for ICI construction trades training, and build awareness of, and traffic to, the CITO website as the primary resource and interactive location for customers</li> </ul>	<ul style="list-style-type: none"> <li>The Communication Strategy will focus on proactive communications from CITO to key target groups including customers (apprentices and employers), stakeholders (e.g. the Board Of Directors, industry, ITA, labour, government, joint boards, training institutions), and media</li> <li>CITO will prepare and implement a communication strategy (e.g., create corporate identity, design communications materials including the website that align with the organization's corporate identity and core values, implement a launch plan and supporting activities, and provide regular messaging about organization's operations</li> </ul>	1

Function	Focus or Objectives	Planned Activities	Staff
<b>Consultation</b>	<ul style="list-style-type: none"> <li>Create mechanisms that permit CITO to seek customer input on its broader activities and plans as well as on specific issues (e.g., substantive modification to programs)</li> </ul>	<ul style="list-style-type: none"> <li>CITO wants to obtain input in the development of its annual plans from a broad range of stakeholders that may include but is not limited to employers, apprentices, and representatives from labour and training providers. To facilitate this, CITO plans to stage consultation meetings in regions across BC on an annual basis using a planned calendar</li> <li>In addition to the broader annual plan review, an ad hoc consultation process will be used to consult on proposed substantive changes to programs. When needed, CITO will coordinate and hold open meetings with regional partners to share information and seek input on the proposed changes</li> </ul>	1
<b>ITA Strategic Initiatives</b>	<ul style="list-style-type: none"> <li>Support strategic initiatives designed to address key issues</li> </ul>	<ul style="list-style-type: none"> <li>Possible examples include initiatives designed to improve completion rates for apprentices, develop a high school/entry program strategy, increase the number of employers who train apprentices, and develop a training/productivity framework for apprentices. Any additional staffing requirements will be funded through the budget for strategic initiatives</li> </ul>	-
<b>Planning, Administration and Reporting</b>			
<b>Annual ITO Service Plan</b>	<ul style="list-style-type: none"> <li>Define the vision, goals, strategies, measures and targets that will be pursued by CITO</li> <li>Communicate the vision, goals, strategies, measures and targets to key stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>On an annual basis, stage a strategic planning workshop with the CITO Board to define the vision, goals, sector priorities and strategies, establish performance measures and targets which are quantifiable, measurable, reliable and attributable to the activities of CITO, and participate in ITA strategic planning sessions</li> <li>Write the service plan detailing budget, priorities, and goals, submit the service plan to the ITA for review, and post the approved service plan on the CITO website</li> </ul>	.25
<b>ITA Annual Service Plan</b>	<ul style="list-style-type: none"> <li>Provide input into the development of the ITA annual service plan</li> </ul>	<ul style="list-style-type: none"> <li>Participate in annual ITA planning session and develop and submit the CITO service plan</li> </ul>	.15
<b>Administration</b>	<ul style="list-style-type: none"> <li>Guide and support implementation of the core service delivery functions</li> </ul>	<ul style="list-style-type: none"> <li>Examples of required functions including management, accounting/bookkeeping, payroll, and administrative support. The staffing estimates cover time spent by 3 Managers (the CEO, Director of Operations and Director of Finance &amp; Planning), 1 finance administration officer, and administrative support staff</li> </ul>	5
<b>Produce Annual Report</b>	<ul style="list-style-type: none"> <li>Report on the progress made against the strategic directions and performance indicators outlined in the Service Plan</li> <li>Help to keep key stakeholders informed and engaged</li> </ul>	<ul style="list-style-type: none"> <li>Establish the tracking systems required to collect data on key performance measures (define indicators, data sources, methodologies and systems) and collect data on an on-going basis, write the content of the annual report (e.g., organization description, activities, progress, results, financial, governance, etc.), and design the format and layout</li> <li>Produce electronic and paper versions of the annual report</li> </ul>	.2
<b>Projected Staffing Requirements</b>			<b>20</b>

An overview of key functions, activities and staffing with each of the groups as well as the Board of Directors and Chief Executive Officer is provided below

**1. Board of Directors**

The Board of Directors currently consists of 11 members. The selection of candidates for the first CITO board was conducted by an independent third party organization selected by the ITA. Board members were selected based on specific criteria and are representative of a broad cross-section of the industry. Subsequent appointments to the CITO board will be based upon selection criteria developed by the current CITO board and articulated in board by-laws.

Four standing committees have been established including Finance and Audit, Governance, Program Standards, and Training and Planning.

- The Finance and Audit Committee is responsible for overseeing the organization’s financial structure and procedures.
- The Governance Committee is responsible for the establishment of mechanisms to support the selection and recruitment of board members, orientation of new board members, populating board standing committees, and managing nominations and approvals of new board members.
- The Program Standards Committee is responsible to ensure that the programs that fall within the CITO trades cluster continue to meet industry, provincial and national standards. The Committee makes recommendations to the Board with regard to program standards including: program outlines, content, and assessment. The Committee also makes recommendations regarding updating of current programs and the development of new programs and credentials.
- The Training and Planning Committee is responsible for the development of the training plan for the trades programs that fall within CITO’s mandate. The Committee makes recommendations to the Board with regard to the content of the training plan including specific trades’ needs, supply, demand balance, and distribution.

**2. Chief Executive Officer**

The Chief Executive Officer (CEO) reports to the Board of Directors. The primary function of the CEO is to work with the Board of Directors to establish the direction for the organization and then to manage the organization towards the achievement of the agreed upon vision, goals, and targets. The executive office will include the CEO and an administrative assistant. The major functions and activities of the executive office are outlined below.

**FUNCTIONS, ACTIVITIES AND STAFF INVOLVED  
IN THE EXECUTIVE OFFICE**

<b>Executive Office</b>	
<b>Main Functions</b>	<ul style="list-style-type: none"> <li>• Define the vision, goals, strategies, performance measures and targets that will be pursued by CITO to be included in the Annual Service Plan</li> <li>• Communicate the vision, goals, strategies, performance measures and targets to key stakeholders</li> <li>• Oversee the operations of the organization</li> <li>• Provide input into the development of the ITA annual service plan and coordinate linkages between the ITA and CITO service plans</li> <li>• Coordinate the implementation of strategic initiatives</li> </ul>

Executive Office	
<b>Key Activities</b>	<ul style="list-style-type: none"> <li>• Provide strategic direction to the organization</li> <li>• Supports operations and administration of Board by advising and informing Board members, interfacing between Board and staff, and supporting Board's evaluation of chief executive</li> <li>• Oversee design, marketing, promotion, delivery and quality of programs, products and services</li> <li>• Recommend yearly budget for Board approval and prudently manage organization's resources within those budget guidelines according to current laws and regulations</li> <li>• Effectively manages the human resources of the organization according to authorized personnel policies and procedures that fully conform to current laws and regulations</li> <li>• Assures the organization and its mission, programs, products and services are consistently presented in strong, positive image to relevant stakeholders</li> <li>• Meet with primary stakeholders on an annual or semi-annual basis</li> <li>• Attend board meetings and provide support and direction</li> <li>• Attend meetings of board committees and provide support and direction</li> <li>• Approve key outputs documents such as the Annual Service Plan, Financial Statements and the Annual Report</li> <li>• Meet with ITA officials on a regular basis</li> <li>• Meet with senior staff on a regular basis to provide direction</li> <li>• Provide administrative support to the Executive and the Board</li> <li>• Provide point of contact for stakeholders</li> <li>• Ensure CITO web site is current and ITA call centre has up to date information</li> <li>• Refer employers and apprentices to the website and call centre</li> <li>• Oversee responses re: referrals from the ITA on key questions which cannot currently be answered by the website or customer service representatives</li> <li>• Arrange travel, meetings and conferences</li> </ul>
<b>Staff</b>	<ul style="list-style-type: none"> <li>• CEO</li> <li>• Administrative Assistant</li> </ul>

**3. Operations**

The major functions of the operations group are to undertake program development (including the development of Red Seal Programs) and the assessment of apprentices. The operations group will operate under the direction of the Director of Operations and include 4 Program Development Officers, a Red Seal Program Development Officer, a Registration and Tracking Officer, 2 Assessment Officers, and an Administrative Assistant. The major functions and activities of the Operations Group are outlined below.

**FUNCTIONS, ACTIVITIES AND STAFF INVOLVED  
IN THE OPERATIONS GROUP**

Operations Group	
<b>Main Functions</b>	<ul style="list-style-type: none"> <li>• Maintain up to date program standards, outlines and descriptions for all trades</li> <li>• Establish and maintain guidelines relating to the development and/or modifications of program standards for assigned programs</li> <li>• Facilitate the Red Seal program review process for trades where BC is the host province/participate in the Red Seal program review process for trades where BC is not the host province</li> <li>• Create awareness of new and updated program standards, outlines and descriptions</li> <li>• Lead development of and process applications for new programs</li> <li>• Ensure high standards with respect to facilities, instructor qualifications, curriculum, assessment processes, student support, and general operations</li> <li>• Facilitate the efficient and effective assessment of apprentices and challengers</li> <li>• Promote increased access to training seats</li> <li>• Assist ITA in the registration process as needed</li> </ul>
<b>Activities</b>	<p><i>New Program Development</i></p> <ul style="list-style-type: none"> <li>• CITO receives preliminary proposal for new training program from industry</li> <li>• CITO staff review the preliminary proposal, interact with proponents regarding further information required, assess proposals against established guidelines and criteria, and make recommendations to the CITO Board</li> <li>• On approval by the Board, preliminary proposal is submitted to the ITA Standards Committee for approval-in-principle</li> <li>• On approval, CITO provides guidance to industry regarding the development of a formal proposal which should include an executive summary, evidence of industry support, information on labour market demand/mobility, a competency/skill profile, and descriptions of training requirements, the relationship to other occupations, other approvals/ requirements needed, impacts and benefits, sustainability, the financial model, and the implementation strategy</li> <li>• CITO staff validate the occupational analysis and proposed standards through independent technical review and prepare a report making recommendations to the CITO Board</li> <li>• On approval by the CITO Board, the final proposal is submitted to the ITA Standards Committee which in turn makes recommendation to the ITA Board which makes the final decision</li> <li>• On approval by the ITA, CITO leads development of the program outlines and assessment tools (as outlined below)</li> </ul> <p><i>Standards Setting/Development of Program Outline</i></p> <ul style="list-style-type: none"> <li>• CITO Board receives request or approves staff recommendation for scheduled review of existing program or approval of proposed new program by the ITA Board</li> <li>• Staff convene a Governance Committee to oversee process</li> <li>• Governance Committee recommends names for project SME committee</li> <li>• Staff recruit SME committee</li> <li>• Staff research issues and prepare for SME meeting</li> <li>• One week workshop staged with SME committee</li> <li>• Staff produce program documents</li> </ul>

<p><b>Activities (continued)</b></p>	<ul style="list-style-type: none"> <li>• Documents sent to stakeholders for comment</li> <li>• Staff finalize program documents</li> <li>• Program profile, description and outline reviewed by Governance Committee</li> <li>• On approval, sent to CITO Standing Program Standards Committee</li> <li>• On approval, sent to CITO Board</li> <li>• On approval of substantive changes, sent to ITA Board</li> </ul> <p><i>Exam design</i></p> <ul style="list-style-type: none"> <li>• On approval of standards and program outlines, staff convene new SME exam committee</li> <li>• Staff recruit committee members</li> <li>• Staff undertake 1 week of preparation for workshop (prepare table of specifications)</li> <li>• Workshop is staged over 3 to 4 weeks (one for each level of the program)</li> <li>• Field testing of exams is undertaken – potentially a 6 to 8 week process (30 writes of each exam)</li> </ul> <p><i>Program launch process</i></p> <ul style="list-style-type: none"> <li>• Joint communication with ITA</li> <li>• Update the CITO website</li> <li>• Stakeholders directed to website where documents are located</li> <li>• Further communications undertaken if issues arise</li> </ul> <p><i>For the five red seal trades where BC is the host province:</i></p> <ul style="list-style-type: none"> <li>• Recommend industry representatives, faculty and facilitators to participate in the process</li> <li>• Lead the provincial review of the NOAs for its trades</li> <li>• Develop the TOS for its trades where BC is the host province and respond to any feedback received from other regions</li> <li>• Participate in the exam development workshop, translation workshop, and exam validation workshop</li> <li>• Participate in the peer review of the exam for its trades</li> </ul> <p><i>For the 14 red seal trades where BC is not the host province:</i></p> <ul style="list-style-type: none"> <li>• CITO staff or designate attend inter-provincial SME meeting (5 days) to vote on changes</li> <li>• CITO act as meeting facilitator as required (50% of meetings)</li> <li>• CITO staff or designate attend translation workshop (5 days)</li> <li>• Recommend industry representatives, faculty and facilitators to participate in the NOA and exam development processes</li> <li>• Lead the provincial review of the NOAs for its trades</li> <li>• Review the TOS prepared by other host jurisdictions</li> </ul> <p><i>Designating new trainers</i></p> <ul style="list-style-type: none"> <li>• Identification/verification of subject matter experts</li> <li>• Referrals to the ITA</li> <li>• Follow-up with the ITA and the subject matter experts to obtain feedback on the results</li> </ul> <p><i>Registration and Assessment</i></p> <ul style="list-style-type: none"> <li>• Conduct apprentice/trainee assessments in the areas of: (1) approving credit for prior learning and work experience; (2) approving eligibility for credential challenges; (3) conducting practical assessments (where applicable); and (4)</li> </ul>
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	assessing and report logbook completion/progress (where applicable). <ul style="list-style-type: none"> <li>• Work with the ITA to develop formal processes and standards for due diligence, implement the processes, and facilitate practical assessments (where applicable)</li> <li>• Assist apprentices and sponsors in completing the online registration system or in accessing alternative ways to register</li> </ul>
<b>Staff</b>	<ul style="list-style-type: none"> <li>• Director of Operations</li> <li>• Admin Assistant</li> <li>• Program Development Officers (4)</li> <li>• Red Seal Program Development Officer</li> <li>• Registration and tracking officer</li> <li>• Assessment officers (2)</li> </ul>

**4. Finance and Planning**

The major functions of the finance and planning group are to service the financial administration needs of CITO, develop and implement the demand forecasting system, and develop the annual training purchase plan based on this system. The group will operate under the direction of the Director of Finance and Planning and include 3 Program Planners, a financial officer, an administration officer and an Administrative Assistant. The major functions and activities of the group are outlined below.

**FUNCTIONS, ACTIVITIES AND STAFF INVOLVED  
IN THE FINANCE AND PLANNING GROUP**

Finance and Planning	
<b>Main Functions</b>	<ul style="list-style-type: none"> <li>• Develop an efficient and effective system for forecasting demand and matching apprentices with spaces to ensure efficient and effective use of resources by balancing supply and demand for training</li> <li>• Determine the demand for training for use in the development of annual training purchase plans and in determining where CITO should focus on increasing the participation of employers and apprentices</li> <li>• Prepare an annual training purchase plan to make recommendations to the ITA on the allocation of funding for training.</li> <li>• Increase the participation of employers and/or apprentices in the system as needed to better balance between supply and demand</li> <li>• Investigate the use of alternative training delivery systems (eg. alternative scheduling, online courses, mobile facilities)</li> <li>• Implement the accounting, payroll and finance functions</li> </ul>

<p style="text-align: center;"><b>Activities</b></p>	<p><i>Planning</i></p> <ul style="list-style-type: none"> <li>• Identify potential sources of primary and secondary data</li> <li>• Work with the college system, other training providers, other ITOs, and the ITA in a multi-stakeholder process to design, develop, and implement a coordinated, effective and efficient system for projecting training demand, communicating with apprentices regarding courses, and coordinating and managing course registrations to balance the number of apprentices and spaces. A key component of this system would be coordinated, cost-effective mechanisms for proactively contacting apprentices (e.g. online, through a call centre, training providers, and/or other stakeholders) to encourage and confirm registration in courses.</li> <li>• Establish mechanisms to obtain input from employer organizations on an on-going basis (e.g. online survey, a telephone survey, and regional meetings)</li> <li>• Collect and analyze the information</li> <li>• Identify the implications for the recommended annual training purchase plans and the need for initiatives to increase the participation of employers and apprentices</li> <li>• Review the results of demand forecasts to identify shortages</li> <li>• Conduct research as required to assess the magnitude of the shortage and the actions required</li> <li>• Develop a budget</li> <li>• Access additional funding for promotional and alternative delivery activities</li> <li>• Work collaboratively with ITA, other ITOs and trainers on projects and initiatives</li> <li>• Assess the results</li> </ul> <p><i>Annual training purchase plan</i></p> <ul style="list-style-type: none"> <li>• ITA staff and Board establish policy and participate in the annual ITA planning session</li> <li>• CITO CEO and Chair participate in an annual ITA planning session</li> <li>• Implement the system to be used to forecasting demand and match apprentices with spaces to ensure efficient and effective use of resources by balancing supply and demand for training</li> <li>• CITO staff communicate training priorities and implications of budget changes and demand forecasts to the training providers</li> <li>• CITO staff negotiate training plans with the training providers</li> <li>• CITO Board plan reviews and approves recommended annual training purchase</li> <li>• TA staff review recommendations, allocate training budget, enter into Contribution Agreements with the training providers, monitor compliance, and prepare annual reports</li> </ul> <p><i>Finance</i></p> <ul style="list-style-type: none"> <li>• Track and record expenses and revenues</li> <li>• Calculate wages and benefits</li> <li>• Produce financial statements and year end financial reports</li> </ul>
<p style="text-align: center;"><b>Staff</b></p>	<ul style="list-style-type: none"> <li>• Director of Finance and Planning</li> <li>• Administrative assistant</li> <li>• Financial Officer</li> <li>• Administrative Officer: Finance</li> <li>• Program Planners (3)</li> </ul>

**5. Communications**

The major functions of the communications group are coordinate consultations with stakeholders regarding annual plans and proposed changes to the training system, and to ensure a high level of communication with stakeholder groups. The group will operate with a Director of Communications and a Communications Assistant. The major functions and activities of the group are outlined below.

**FUNCTIONS, ACTIVITIES AND STAFF INVOLVED  
IN THE COMMUNICATIONS GROUP**

<b>Communications</b>	
<b>Main Functions</b>	<ul style="list-style-type: none"> <li>• Create mechanisms that permit CITO to seek customer input on its broader activities and plans as well as on specific issues (e.g., substantive modification to programs)</li> <li>• Create a Communications Strategy to create awareness of CITO, create a mechanism whereby CITO can learn and share information directly with customers around the province, position CITO as the principal resource in British Columbia for ICI construction trades training, and build awareness of, and traffic to, the CITO website as the primary resource and interactive location for customers.</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Plan and execute all communication and consultation initiatives within organization</li> <li>• Develop annual plans including strategies, messaging, timing, and objectives.</li> <li>• Write the CITO annual report referencing illustration progress made against the strategic directions and performance indicators in the Service Plan</li> <li>• Develop and ensure consistency in all communications materials including news releases, e-mail blasts, presentation kits, advertising, letters, newsletters, web content, and other points of contact.</li> <li>• Develop consultation program plans including logistics, timing, budgets, and follow-up.</li> <li>• Coordinate meeting schedules, locations, participation and briefings to facilitate process planning with customers and key stakeholders.</li> <li>• Build relationships among external business partners including ITA, key suppliers, industry, other ITO's and training institutions to facilitate processes, dialogue and business intelligence.</li> <li>• Liaise with external organizations including industry associations, agencies, and suppliers to facilitate creation of materials while working closely with the executive to ensure alignment with core values and corporate identity.</li> <li>• Coordinate website content in support of programs, and other communications initiatives.</li> <li>• Respond to media contacts and engage in targeted media relations.</li> <li>• Identify opportunities for process improvements and lead their implementation.</li> </ul>
<b>Staff</b>	<ul style="list-style-type: none"> <li>• Director, Communications</li> <li>• Communications Assistant</li> </ul>

## B. PROJECTED BUDGET

### 1. Operating Budget for Full-Service Delivery

The annual operating costs for CITO once full-service delivery is achieved are budgeted at approximately \$3.6 million annually.

#### PROJECTED ANNUAL OPERATING BUDGET FOR CITO

Budget Items	Costs
Wages, Salaries and Benefits	\$2,026,000
Strategic Initiatives	\$500,000
Non-salary Program Development	\$300,000
Consultation & Communication	\$200,000
Rent	\$180,000
Travel	\$130,000
Office Supplies	\$50,000
Database Development and Management	\$45,000
Telephone Operation	\$35,000
HR Services	\$30,000
Repair and Maintenance	\$30,000
Parking	\$25,000
Board Expenses	\$25,000
Courier and Postage	\$12,000
Cell and Blackberry	\$10,000
<b>Total</b>	<b>\$3,598,000</b>

The major budget items include:

- *Wages and benefits*, which are budgeted at approximately \$2 million. The benefits were estimated at an average of 20%.
- \$500,000 for *strategic initiatives*. It is anticipated two major initiatives will be undertaken each year. Possible examples include initiatives designed to improve completion rates for apprentices, develop a high school/entry program strategy, increase the number of employers who train apprentices, and develop a training/productivity framework for apprentices.
- *Non-salary program development costs* of \$300,000. This includes the costs of per diems and travel costs of subject matter experts and others needed for the program development process.
- \$200,000 for *consultation and communications*. CITO will need to keep in contact with and consult with a wide range of stakeholders throughout the province. This is a key part of the operating principles and is in direct response to stakeholder input obtained during the recent consultation process. Key elements of the consultation and communications budget are show below.

**CITO CONSULTATION AND COMMUNICATION BUDGET**

Area	Budget
<b>Consultation</b>	
Annual Consultation Meetings	\$35,000
Media	\$20,000
Feedback Collection	\$10,000
Newsletter Production/Distribution	\$10,000
Research	\$30,000
<b>Sub-total</b>	<b>\$105,000</b>
<b>Communications</b>	
Corporate Identity	\$4,000
Launch Program	\$20,000
Signature Brochure	\$4,000
Other Print Materials	\$3,000
Trade Advertising	\$15,000
Trade Show Booth	\$5,000
Trade Show Participation	\$4,000
Promotional Materials	\$5,000
Design Services	\$5,000
Research	\$30,000
<b>Sub-total</b>	<b>\$95,000</b>
<b>TOTAL</b>	<b>\$200,000</b>

- \$180,000 for rent based on projected space requirements of about 6,000 square feet.
- Travel costs of \$130,000 based on a projection of current travel trends for CITO staff and the need for future regional consultation meetings.

**2. Transition Costs**

In addition, a transition budget will be required to cover the costs associated with moving to larger quarters, undertaking lease-hold improvements in the new facilities, purchasing furniture, computers and other equipment, recruiting and training staff, and implementing communication systems. These costs are budgeted at \$322,000 as shown below.

**BUDGETED TRANSITION COSTS FOR CITO**

Budget Items	Transition Costs
Moving Costs	\$10,000
Leasehold Improvements	\$100,000
Computer and Server Purchase	\$50,000
Board Room Equipment and Furniture	\$10,000

Budget Items	Transition Costs
Office Furniture	\$40,000
Phone and Computer Cables Installation	\$6,000
Telephone System and Install	\$16,000
IT Support	\$20,000
HR Transition	\$70,000
<b>Total</b>	<b>\$322,000</b>

**C. IMPLEMENTATION PLAN**

The total budget expenses for full service operation will be ramped up over a period of time. The table outlines the proposed schedule for implementation.

**PROPOSED TIMING OF SPECIFIC ACTIONS**

Actions	QUARTERS
Hire Director of Finance and Planning	Sept- Dec 2008
Plan implementation	
Begin training plan process: Phase I	
Secure expanded office space	
Secure HR services for transition	
Write job descriptions, set wage scales and benefits	Jan-March 2009
Purchase equipment	
Undertake leasehold improvements/telephone system installation	
Move office	
Hire operations and communications staff	
Begin first strategic initiative	April-June 2009
Begin communication and consultation activities	
Commence assessment/challenges processes	
Hire training plan core staff	July-Sept. 2009
Commence evaluation activities	
Complete staff hiring process	
Training plan activities: Phase II	
Begin second strategic initiative	Oct-Dec 2009
Training plan process: Phase III	
Commence program evaluation process	

The dates in the table are estimates only. However, the sequence of the implementation plan is recommended as a suitable way to ramp up operations.

**D. PERFORMANCE MEASURES**

CITO will need to report on its performance on an annual basis. Below are listed a series of performance measures that can be used for reporting progress of the agency’s goals.



**1. Key Performance Measures**

The table below indicates key performance measures that CITO will need to use for each area of responsibility.

**CITO PERFORMANCE MEASURES**

Area	Measures
<b>Program Development</b>	<ul style="list-style-type: none"> <li>• Level of apprentice satisfaction with the training options</li> <li>• Perceptions of employers regarding workplace outcomes for apprentices</li> <li>• Number of updated and new programs per year</li> <li>• Number of exam questions developed and field tested</li> <li>• Approval rates of standards and programs by the ITA</li> <li>• Perceptions of ITA, employers and trainers regarding the outputs</li> <li>• Number of Red Seal Process led/number participated in</li> <li>• Pass rate for Red Seal Exams by apprentices</li> <li>• Completion rates for apprentices</li> </ul>
<b>Demand Forecasting System</b>	<ul style="list-style-type: none"> <li>• Accuracy/reliability of the forecasting system</li> <li>• Costs of implementing the forecasting system</li> </ul>
<b>Increasing Employer and Apprentice Participation</b>	<ul style="list-style-type: none"> <li>• Change in the number of apprentices and employers participating in targeted areas</li> <li>• Activity measures developed for specific initiatives (e.g. number of collateral pieces distributed, number of views)</li> </ul>
<b>Designating Training Providers</b>	<ul style="list-style-type: none"> <li>• Number of referrals made</li> <li>• Satisfaction of ITA and subject matter experts</li> <li>• Performance of private trainers</li> </ul>
<b>Developing Annual Training Purchase Plan</b>	<ul style="list-style-type: none"> <li>• Efficiency measures regarding resource allocation</li> <li>• Acceptance of the recommendations by the ITA</li> <li>• Consistency of the plan with the training priorities</li> <li>• Accuracy of the plan in term of forecasting demand</li> <li>• Capacity utilization for CITO trades</li> <li>• Length of waiting lists</li> </ul>
<b>Registration Process</b>	<ul style="list-style-type: none"> <li>• Number of calls and emails responded to</li> <li>• Success rate in responding to enquiries</li> <li>• Number of registrations in apprentice, youth and foundation programs</li> </ul>
<b>Apprentice Assessment System</b>	<ul style="list-style-type: none"> <li>• Number of assessment conducted</li> <li>• Level of stakeholder satisfaction</li> </ul>
<b>ITA Strategic initiatives</b>	<ul style="list-style-type: none"> <li>• Activity and outcome measures developed for specific initiatives</li> </ul>

Area	Measures
Annual Service Plan	<ul style="list-style-type: none"> <li>• Performance against budget</li> <li>• Timeliness of production</li> <li>• Level of distribution</li> <li>• Perceptions of key stakeholders</li> </ul>
ITA Annual Service Plan	<ul style="list-style-type: none"> <li>• Influence on the plan</li> </ul>
Annual Report Production	<ul style="list-style-type: none"> <li>• Performance against budget</li> <li>• Timeliness of production</li> <li>• Level of distribution</li> <li>• Perceptions of stakeholders</li> </ul>
Contact Point For Stakeholders	<ul style="list-style-type: none"> <li>• Number of calls and emails received</li> <li>• Success rate in addressing issues</li> <li>• Level of stakeholder satisfaction</li> </ul>
Communication Strategy	<ul style="list-style-type: none"> <li>• Activity measures</li> <li>• Distribution measures/views</li> <li>• Awareness level of CITO</li> <li>• Traffic on CITO website</li> <li>• Earned media coverage</li> <li>• Achievement of objectives for specific campaigns</li> </ul>
Consultation Strategy	<ul style="list-style-type: none"> <li>• Number of annual sessions held/participation levels</li> <li>• Evidence of action taken based on input received</li> <li>• Level of industry support for plans, activities and specific initiatives or changes</li> <li>• Level of industry satisfaction with CITO</li> </ul>

**2. Performance Indicators and Data Sources**

Sources of data that can be used to report on the progress made by CITO include tracking of the activities by staff, client surveys, financial data and secondary data as outlined below.

**KEY DATA SOURCES FOR THE PERFORMANCE MEASURES**

Data Source	Performance Indicators
Tracking By CITO Staff	<ul style="list-style-type: none"> <li>• Number of inquiries received through mail, telephone, and website</li> <li>• Web site visitors/hits</li> <li>• Number of exam questions developed and field tested</li> <li>• Earned media coverage</li> <li>• Number of updated and new programs per year</li> <li>• Approval of standards and programs</li> <li>• Number of Red Seal process led/number participated in</li> <li>• Acceptance of the training plan recommendations by the ITA</li> <li>• Consistency of the training plan with the training priorities</li> <li>• Timeliness of production of annual report</li> <li>• Level of distribution of annual report</li> <li>• Success rate in responding to enquiries</li> </ul>

Data Source	Performance Indicators
<p><b>Consultation With Stakeholders</b></p>	<ul style="list-style-type: none"> <li>• Level of stakeholder satisfaction (employers, trainers and ITA)</li> <li>• Level of industry support for plans, activities and specific initiatives or changes</li> <li>• Improved workplace outcomes for apprentices</li> <li>• Awareness levels of CITO</li> <li>• Perceptions by stakeholders of annual report</li> <li>• Participation levels in consultation process</li> <li>• Level of industry support for plans, activities and specific initiatives or changes</li> </ul>
<p><b>ITA Data/ Surveys</b></p>	<ul style="list-style-type: none"> <li>• Level of apprentice satisfaction with the training options (annual survey)</li> <li>• Awareness of CITO (annual survey)</li> <li>• Pass rate for Red Seal Exams by apprentices</li> <li>• Completion rates for apprentices</li> <li>• Accuracy/reliability of the forecasting system (comparison of actual to project training spaces)</li> <li>• Capacity utilization for CITO trades</li> <li>• Performance of private trainers</li> <li>• Change in the number of apprentices and employers participating in targeted areas</li> <li>• Efficiency measures regarding resource allocation for training</li> <li>• Length of waiting lists</li> <li>• Number of registrations in apprentice, youth and foundation programs</li> <li>• Increase in number of employers participating in target areas</li> </ul>
<p><b>Financial Data</b></p>	<ul style="list-style-type: none"> <li>• Sources and uses of funding</li> <li>• Costs of implementing systems and performing functions</li> <li>• Performance against the budget</li> </ul>
<p><b>Initiative Specific</b></p>	<ul style="list-style-type: none"> <li>• Activity measures developed for specific initiatives implemented to increase participation of employers and apprentice (e.g. number of collateral pieces distributed, number of views)</li> <li>• Activity and outcome measures developed for specific strategic initiatives</li> <li>• Achievement of objectives for specific campaigns</li> </ul>

The results will be summarized in an annual report prepared on the progress achieved by CITO.

