



British Columbia Ferry and Marine Workers' Union Strategic Plan 2017 – 2022

About this Plan

This strategic plan is the foundation of how we, the British Columbia Ferry and Marine Workers' Union ("BCFMWU"), will conduct our operations and demonstrate accountability to our stakeholders over the next five years. The plan presents our purpose (mandate), vision, guiding values, goals, and key activities, and how we will track and measure results. It will be the framework within which we will prepare our annual business plans. The strategic plan is brief by design; it is intended to leave room for creativity and responsiveness to potential changes in our environment.

The creation of this plan began with an externally-facilitated session held with the Provincial Executive in May 2016. This was followed by interviews and a September 2016 externally-facilitated session with Local Presidents. In early November 2016, four additional workshops were hosted at the Shop Stewards Conference in Harrison Hot Springs, which provided opportunities for shop stewards to provide input regarding key issues, opportunities, a vision and goals for the strategic plan. This strategic plan is based upon the widespread and thoughtful input provided by these stakeholders from May to November 2016. The plan is supplemented by an implementation road map to be held by the Provincial Executive and approved by the BCFMWU Triennial Convention in 2018. The plan itself covers:

1. An overview of the BCFMWU
2. Environmental Scan
3. Mission, Vision, and Values
4. Goals and Supporting Strategies and Activities
5. Measuring Success
6. Moving Forward

1. About British Columbia Ferry and Marine Workers' Union¹

History

On January 1st, 1977, the BC government reorganized the ferry service and established a new Crown Corporation. As the Crown Corporation was bound by the BC Labour Code, the way was paved for the formation of the BCFMWU.

The founding Convention of BCFMWU Unlicensed members was held in Victoria in January 1977. Almost immediately, the new Union was faced with negotiating a Collective Agreement. Negotiations, even with a mediator, were unsuccessful and on October 5th, 1977, the way was cleared for strike action. The strike lasted only two days and a mediated settlement was reached after extensive negotiations. On June 17th, 1978, the BCFMWU signed its first Collective Agreement.

After two years of legal battles, the Labour Relations Board, on April 27th, 1979, made BCFMWU the sole bargaining agent for all ferry workers, including licensed officers. This decision finally brought all ferry workers together in one organization.

BCFMWU Quick Facts	
Number of Members	<i>Approximately 3,600</i>
Number of Locals	<i>11 Unlicensed Locals</i>
Number of Ship Officers (Membership)	<i>9 Ship Officer Locals</i>
Deas Dock Component (DDC)	<i>An autonomous component of the BCFMWU and represents members regular and casual that are employed by the BC Ferry Services or its Subsidiaries.</i>
Head Office	<i>Nanaimo</i>
Year Established	<i>1977</i>
Collective Agreement Effective Dates	<i>Oct. 31, 2015 – Oct. 30, 2020</i>
Number of Agreements Since Inception	<i>13 Agreements</i>
Number of Vessels Under BCFMWU	<i>35</i>
Number of Ports Under BCFMWU	<i>47</i>

The Coastal Ferry Act ("CFA") was introduced in 2003 by the then Liberal Government. The intention was to put BC Ferries on the road to privatization. Shortly after the CFA was legislated, the Union began bargaining. When talks broke down, the response escalated to a fleet wide strike and public protest. After five days of bitter dispute and by mutual agreement, the parties proceeded to binding Arbitration under the oversight of an independent arbitrator.

The Collective Agreement that came out of the 2003 strike was for nine years and started the Exclusion/Inclusion battle that still continues today.

Today, the BCFMWU is the largest Maritime Union in Canada, representing over 3600 members, from across 35 vessels, 47 ports of call, and numerous other job sites. BCFMWU membership includes a diverse group of Trades, Ships' Officers, Commercial Services Drivers and Unlicensed Workers, both ship and shore.

On November 17th, 2015, BCFMWU members ratified a new five-year Collective Agreement. The ratification of this current agreement represents only the second time in BCFMWU history that an agreement was reached without a third party and prior to the expiration of the agreement.

Locals

BCFMWU's Locals consist of 11 (eleven) Locals that represent unlicensed memberships and 9 (nine) Locals that represent the Ships' Officers' Component. Additionally, Deas Dock Component is an autonomous component of the BCFMWU, represents members, regular and casual, that are employed by the BC Ferry Services or its Subsidiaries that are covered within Article 33

¹ For more information about the BCFMWU, please see <http://www.bcfmwu.com/about-us>.

of the Collective Agreement. Deas Dock is located on the Fraser River in Richmond and is where BC Ferries refits and does maintenance on vessels.

The following maps and table list and show the locations of these locals.



Unlicensed Membership		Ship Officers Component Membership	
Local	Location	Local	Location
1	Swartz Bay	12	Nanaimo
2	Nanaimo	13	Tsawwassen
3	Tsawwassen	14	Horseshoe Bay
4	Horseshoe Bay	15	QPR / Bear Cove / Skidegate
5	Langdale	16	Powell River
6	Powell River/N. Gulf Islands	17	Northern Gulf Islands
7	Southern Gulf Islands	18	Swartz Bay
8	Richmond Stores	19	Langdale
9	Victoria Head Office	20	Southern Gulf Islands
10	Northern Operations		
11	Northern Gulf Islands		

Committees

BCFMWU's Standing and Ad-Hoc Committees are established by the Provincial Executive to direct, advise, and strengthen the work of our Union in important areas. Current committees are listed below. Additional information can be found at:

<http://www.bcfmwu.com/committees>.

- Asbestos Committee
- Communications Committee - communications@bcfmwu.com
- Convention Committee
- Education Committee
- Finance Committee
- First Nations Vision Committee
- Hours of Work Committee
- Human Rights Committee
- Occupational Health and Safety Committee - safety@bcfmwu.com
- Solidarity Committee

- Young Workers Committee

2. Environmental Scan

Economic Outlook

BC, together with Ontario, have led economic growth in Canada over the last year. However, while these economies are expected to remain strong, a cooling of their respective housing markets will likely result in slower economic growth in 2017. Alberta and Saskatchewan are expected to experience higher levels of economic growth in 2017 due to an increase in oil prices. Tourism is expected to continue to be strong across Canada, which can positively impact ferry passenger traffic in coastal BC.

Several factors are causing uncertainty with regard to future economic growth in Canada and BC. Key factors underlying this uncertainty include:

- Potential shifts in U.S. government policies resulting from the imminent change in the U.S. administration in January 2017;
- The new national carbon price plan;
- The approval of major pipeline projects;
- Federal government regulations that are intended to help manage risk in regional housing markets, including markets in BC; and,
- The spring 2017 election in BC.

BCFMWU Strengths, Weaknesses, Opportunities and Threats

In addition to the broader economic conditions noted above, there are several strengths, weaknesses, opportunities and threats that can influence the operating environment for the BCFMWU. These were identified and discussed during the workshops and interviews leading up to the development of the strategic plan. Strengths and weaknesses are internal, and, as such are easier to influence than threats, which are part of the external operating environment of the BCFMWU. Opportunities may be a blend of internal and external factors.

Strengths

The key strengths that BCFMWU has are listed below.

- ✓ The BCFMWU has strong financial controls and is in a strong financial position
- ✓ The BCFMWU has good relationships with affiliates
- ✓ The BCFMWU has good breadth and depth of knowledge around the fleet
- ✓ The steward base is growing
- ✓ Relative to several other large unions, the BCFMWU is small (4,000 members), which provides opportunities to be nimble
- ✓ The BCFMWU Executive works well together
- ✓ There is unity between the Ship Officers' Component ("SOC") and the Unlicensed Members

Weaknesses

The key weaknesses were grouped into six categories.

Management/Leadership/Operations

- ✓ The entire union lacks strategic direction
- ✓ The Constitution is outdated (40 years old); it is ambiguous and does not define roles clearly
- ✓ The BCFMWU often spends time and money on projects that are not fully implemented due to:
 - Some units operating in work silos
 - Lack of discipline regarding follow up
 - Poor accountability
- ✓ Historically, the transition between an out-going and in-coming executive has been poor, resulting in lack of continuity in key areas and the creation of poor morale
- ✓ There is poor oversight with regard to some committees, resulting in a lack of accountability and a lack of consistent reporting out on achievements
- ✓ The BCFMWU lacks a disciplined process for budgetary planning, resulting in uncertainty with regard to the use of funds and lack of planning with regard to ensuring contingency funds are available for unplanned needs

Human Resources

- ✓ The average age of members is in the range of 50 – 55; there is no strategic planning in place to address succession issues
- ✓ There is no effective training program in place for people that are newly elected
- ✓ Many members are not interested in training
- ✓ ~~The number of volunteers is~~ Volunteerism is declining; existing volunteers are over-taxed
- ✓ There is a need for more mentoring, ~~including setting aside the time to mentor~~ including a mentorship framework
- ✓ There is a lack of training in the field of mental health

Communication/Engagement

- ✓ Many members have little interest in the union, and are not engaged
- ✓ There is a need for a more effective communication strategy, including communicating its value and successes to members
- ✓ ~~The union does not effectively communicate its successes~~
- ✓ ~~Currently, insufficient~~ More financial resources ~~are~~ should be dedicated to membership engagement and communication, including clearer ownership of these responsibilities

Technology

- ✓ The union ~~is not using up to date technology~~ lacks an integrated IT strategy
- ✓ The diversity in age of members presents challenges regarding which types of technology to support and promote
- ✓ Education regarding ~~technology~~ successful integrated deployment of modern technology and systems is lacking

Opportunities

While many opportunities were noted, the key opportunities for BCFMWU are listed below.

- ✓ Build a proactive culture (moving away from the historical reactive culture)
- ✓ Engage and motivate members more effectively

- ✓ Establish effective systems for leadership and management that are valued and, as a result, maintained when the Executive changes following an election
- ✓ Develop stronger connections with coastal communities
- ✓ Develop stronger connections with other communities (First Nations, ethnic communities, LGBTQIA², youth, women, etc.)
- ✓ Recruit young, bright, motivated people (succession planning)
- ✓ Build stronger, cohesive locals and local leadership

Threats

The key threats are listed below.

- ✓ Declining membership
- ✓ Potential changes to the provincial and/or federal regulatory environment
- ✓ Potential free trade deals and
- ✓ amendments to the Coastal Ferry Act
- ✓ ~~An~~ anti-union sentiment exists ~~both~~ within ~~and outside~~ the union, ~~and within the~~ public, and -media
- ✓ Forced interest arbitration
- ✓ Changes in government, which can present uncertainty for the BCFMWU
- ✓ Aging membership
- ✓ ~~Competition~~ from potential bridge construction (such as the Sunshine Coast) (ie. bridge construction, flights, other service providers, unforeseen disruptive technologies)

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² Lesbian, Gay, Bisexual, Transsexual, Queer, Intersex, Asexual



3. Our Mission, Vision, and Values

The following mission, vision, ideal future state and values were prepared based on the input provided by the BCFMWU during sessions in May, September and November of 2016.

Mission

As an advocate for workers, we strengthen and uphold collective rights and benefits and educate and organize our members

Vision

The leading marine union in Canada

Ideal Future State

Strong, protected member rights, a safer work environment, and very engaged members that experience the benefits of high-quality employment

Core Values

The BCFMWU's values are its essential and enduring tenets that should withstand the test of time and any change in Executive leadership. The following core values are guidelines for how we conduct ourselves on a day-to-day basis.

- ✓ Encouraging **forward-looking, progressive** behavior
- ✓ Upholding **fairness** in all that we do
- ✓ Establishing **trust and respect** as the basis for our internal and external relationships
- ✓ Respecting and celebrating **diversity** amongst members and within the communities in which we operate
 - ✓ Encouraging **unity** amongst members
 - ✓ Supporting opportunities for **further education**
 - ✓ Striving for **meaningful engagement** of all members

4. Our Goals and Supporting Strategies

The BCFMWU will strive to achieve the following goals and strategies over the next five years, and beyond. The goals and strategies are designed to support our mission, vision, and values, and to address many of the key strengths, weaknesses, opportunities and threats listed earlier in the Environmental Scan. A more detailed description of specific activities to support each strategy is presented later in the document.

Goal A – Ensure the membership is well-informed and engaged

The need to more effectively engage the membership was raised repeatedly during the workshops and interviews conducted to support this strategic plan. This is required to ensure the BCFMWU is strong; without an engaged membership, the union cannot attain its vision of being the “leading marine union in Canada”. This goal, and its supporting strategies, will impact issues in other areas, such as the human resource issue related to effective succession planning. The following strategies are designed to achieve the goal of more effectively informing and engaging the membership.

Build awareness amongst “new hires” about the value associated with being a union member.

This will be done by designing and implementing a formal orientation and ongoing engagement process for “new hires” and creating a mentorship ~~and career path~~ program.

Use a Communication Plan to effectively inform and engage key audiences:

- o *The general membership;*
- o *Shop stewards; Local Executive members*
- o *Members who belong to equity-seeking groups; and,*
- o *New and young - worker members.*

Goal B – Develop and encourage informed and supportive communities

The BCFMWU and, to varying degrees, its locals are involved in their local municipal communities, in addition to cultural and ethnic communities and LGBTQIA communities. These relationships are critical to the health of the union. This goal focuses on developing and encouraging more informed and supportive communities, which, in turn, will strengthen the BCFMWU. The following strategies are designed to achieve the goal of developing and encouraging more informed and supportive communities.

Work to understand and support the diverse communities that are relevant to the BCFMWU.

This will be done by creating a “Community Action Committee” to develop an annual schedule at the local level for supporting targeted events that are external to the BCFMWU.

Create sustained broad awareness about the value of the BCFMWU to members and to relevant communities.

This will be done by designing and implementing an external communication plan aimed at increasing awareness about the value of the BCFMWU to the communities in which the union operates.

Goal C – Strengthen and defend the Collective Agreement

Strengthening and defending the Collective Agreement is a foundational goal for the BCFMWU. This goal represents the core of the BCFMWU. The following strategies are designed to ensure that the BCFMWU continues to strengthen and defend the Collective Agreement.

Strengthen the ability of the BCFMWU to advocate for members.

This will be done by increasing awareness about successful outcomes, posting local wins on the website and in quarterly newsletters, ensuring that the Safety Committee channels policy into compliance, and ensuring that Union Management Consultations (“UMC”) are effective.

Build strong, efficient and effective locals.

This will be done by ensuring the Labour Relations Officers’ (“LRO”) support is effective and quick and that communication processes and structured meetings support the local executive and shop stewards.

Goal D – Govern and manage for quality results

Governing and managing for quality results is considered a fundamental operational goal for the BCFMWU. Achieving this goal is critical to the success of the BCFMWU, and will help enable the union to achieve the vision of being the “leading marine union in Canada”. The following strategies relate to governing and managing for quality results.

Update and modernize the Constitution.

This will be done by dedicating resources to update and modernize the Constitution.

Strategically address the critical succession issues facing the BCFMWU.

*This will be done by **reviewing staff and elected structures, and** developing and implementing a succession plan for the BCFMWU and including succession planning status as a standing agenda item at key meetings.*

Enhance the effectiveness and accountability of BCFMWU committees.

This will be done by formalizing the structure, terms of reference and reporting framework for all committees, reviewing the value of each committee on an annual basis to determine if the committee should continue, be re-structured or be eliminated, and, as part of the annual budget planning process, reviewing the effectiveness of each committee prior to committing funds for the upcoming year.

Enhance the effectiveness and accountability of joint committees.

This will be done by ensuring that reporting is carried out according to the defined process and associated schedule.

Enhance the effectiveness of financial planning and reviews.

This will be done by establishing a formalized and rigorous process for annual budget planning and review.

Goal E – Ensure the Collective Bargaining Process is Effective

Historically, the process for collective bargaining has been haphazard and poorly timed. This goal aims to ensure that processes are in place to ensure that collective bargaining is carried out in an intelligent and effective manner.

Formalize a standard process and associated timelines to be used to prepare for collective bargaining.

This will be done by identifying the bargaining team early, prioritizing the bargaining proposals immediately after the Convention, having the Provincial Executive identify priorities and resolutions, ensuring that successive C.A. dates do not coincide with changes in terms of office and fully research the pros and cons of leaving the PSBA.

Summary of Goals and Strategies

	GOALS	STRATEGIES
STRATEGIC PRIORITIES	A. Ensure the Membership is Well-Informed and Engaged	<ul style="list-style-type: none"> • Build strong awareness amongst “new hires” about the value associated with being a union member. • Effectively inform and engage key member audiences: <ul style="list-style-type: none"> ○ The general membership; ○ Members who belong to minorities; and, ○ Millennial members.
	B. Develop and Encourage Informed and Supportive Communities	<ul style="list-style-type: none"> • Work to understand and support the diverse communities that are relevant to the BCFMWU. • Create sustained broad awareness about the value of the BCFMWU to members and to relevant communities.
	C. Strengthen and Defend the Collective Agreement	<ul style="list-style-type: none"> • Strengthen the ability of the BCFMWU to advocate for members. • Build strong, efficient and effective locals.
FOUNDATIONAL PRIORITIES	D. Govern and Manage for Quality Results	<ul style="list-style-type: none"> • Update and modernize the Constitution. • Strategically address the critical succession issues facing the BCFMWU. • Enhance the effectiveness and accountability of BCFMWU committees. • Enhance the effectiveness and accountability of joint committees. • Enhance the effectiveness of financial planning and reviews.
	E. Ensure the Collective Bargaining Process is Effective	<ul style="list-style-type: none"> • Formalize a standard process and associated timelines to be used to prepare for collective bargaining.

Detailed List of Activities to Achieve the Goals and Strategies

GOAL A: Ensure the Membership is Well-Informed and Engaged	
STRATEGIES	ACTIVITIES
<p>Build strong awareness amongst “new hires” about the value associated with being a union member</p>	<ol style="list-style-type: none"> 1. Design and implement a formal orientation and ongoing engagement process for “new hires”. <ul style="list-style-type: none"> ○ Identify who should deliver orientation programs (e.g., local president, “advanced steward”, or LRO) ○ Ensure that those assigned to deliver orientations are well-prepared: <ul style="list-style-type: none"> ▪ Provide appropriate training (this may include public speaking, “facing management”, and/or other types of training) ▪ Provide a document that includes: <ul style="list-style-type: none"> • Consistent messaging to be delivered by those providing orientation • “Talking points” to support the above-noted message delivery ○ Staff to ensure the company is aware of start dates for new hires and provides this information to local presidents ○ Arrange for check-in meeting with each “new hire” and the local president at conversion to casual status ○ Provide a package – both hard copy and online – that welcomes new employees and orients them to the BCFMWU: <ul style="list-style-type: none"> ▪ Pamphlet with bios for Executive and Presidents, including photographs and information that tells their story both professionally and personally ▪ Relevant contact information, websites, Facebook page(s), etc. ▪ Profiles of selected employees, with testimonials about the benefits of belonging to the BCFMWU ▪ Procedures related to the BCFMWU ▪ Social media/broadcast policy ▪ Calendar of key events ○ Ensure that key messaging regarding the union is current, relevant and appealing to a younger audience 2. Ensure new hires are aware of quarterly local membership meetings
<p>Effectively inform and engage key member audiences</p> <ul style="list-style-type: none"> • The general membership; • Shop stewards; • Members who belong to equity-seeking 	<ol style="list-style-type: none"> 3. Design and implement an internal communication plan aimed at the diverse target audiences of the BCFMWU. Key investments and activities associated with this are as follows. <ul style="list-style-type: none"> ○ Assign/hire communication professional(s) to develop communication tools and content aimed at informing and engaging the diverse BCFMWU membership ○ In addition to existing website and newsletter(s), provide communication tools that facilitate effective communication with members, such as: <ul style="list-style-type: none"> ▪ Face Book pages (e.g., central and local Face Book pages), as long as this is an effective and relevant communication tool

GOAL A: Ensure the Membership is Well-Informed and Engaged

STRATEGIES	ACTIVITIES
groups; and, • New and young members.	<ul style="list-style-type: none"> ▪ Other relevant social media tools ▪ Updated website that is mobile and app friendly ○ Create content that targets the diverse membership of the BCFMWU ○ Endeavour to have key communication content provided in multi-languages: <ul style="list-style-type: none"> ▪ Posters (such as “Right to Refuse Unsafe Work” posters) ▪ Relevant content on Face Book and the website ○ Conduct semi-annual surveys of members to solicit input on how communication can be improved and monitor overall engagement levels over time 4. Direct the Provincial Executive to ensure that each BCFMWU committee includes a diverse mix of members that reflects the membership population (including creating an equity-seeking position on each committee, if appropriate) 5. Hold regular “touching base” meetings with each “new hire” for the first year of employment. 6. Provide incentives that will encourage stronger attendance at local meetings and events <ul style="list-style-type: none"> ○ Feature guest speaker(s) that are relevant to members’ interests ○ Award draw prizes (e.g., BCFMWU swag, gift cards, etc.) to attendees ○ Find well-suited venues for meetings (may include BC Ferries’ on-site facilities) ○ Provide financial incentives to host local meetings ○ Provide other incentives to encourage attendance at local meetings ○ Schedule meeting times to capture the largest number of members, based on travel times to and from work 7. Host special events at locals at key points during the year, such as: <ul style="list-style-type: none"> ○ “Family Fun Days”

GOAL B: Develop and Encourage Informed and Supportive Communities

STRATEGIES	ACTIVITIES
Work to understand and support the diverse communities that are relevant to the BCFMWU	8. Ensure that the appropriate committee (e.g., could be the Solidarity Committee) continues to develop an annual schedule, with local level input, for supporting targeted events that are external to the BCFMWU, such as: <ul style="list-style-type: none">○ Canada Day parades○ Ethnic celebrations (e.g., Vaisakhi Parade, Chinese New Year, etc.)○ Gay Pride parades○ First Nations celebrations
Create sustained broad awareness about the value of the BCFMWU to members and to relevant communities	9. Design and implement an external communication plan supported by PE that is aimed at increasing awareness about the value of the BCFMWU to the communities in which our union operates. To accompany the communication plan, ensure that there is a schedule and format for reporting out on results. <ul style="list-style-type: none">○ Assign/hire communication professional(s) to develop communication tools, content and special events aimed at building awareness in communities about the good work of the union.○ Develop a schedule and a simple framework for reporting our on the results of the communication plan.○ Target communities/organizations/groups may include:<ul style="list-style-type: none">▪ Municipalities and associated resident populations▪ Local businesses▪ First Nations▪ School districts▪ Local sports teams

GOAL C: Strengthen and Defend the Collective Agreement

STRATEGIES	ACTIVITIES
Strengthen the ability of the BCFMWU to advocate for members	<ul style="list-style-type: none">10. Increase awareness about successful outcomes (only where privacy is not an issue)<ul style="list-style-type: none">○ Post wins on website and quarterly newsletters (only if appropriate)○ Attempt to avoid casting a negative light on the Company (BC Ferry Services Inc.)11. Ensure that the Safety Committees are effective and have active union representation12. Ensure that Union Management Consultations (“UMC”):<ul style="list-style-type: none">○ Are timely and effective (scheduled quarterly or semi-annually for local and senior UMCs)○ Include staff representatives
Build strong, efficient and effective locals	<ul style="list-style-type: none">13. Ensure the LRO’s support is effective and quick<ul style="list-style-type: none">○ Use LROs as a mechanism to ensure regular local meetings and UMCs occur14. Encourage locals to use the new “Local Planning Tool Kit” that was unveiled in November 2016 with the assistance of LROs15. Provide opportunities for members to meet and interact with the Provincial Executive<ul style="list-style-type: none">○ Encourage local presidents to invite the most active shop stewards to attend Provincial Executive meetings as “observers” (expenses to be covered by the local)○ Schedule regular, annual visits by PEO members to each local and ensure this practice is carried forward following any change in PEO16. Create and implement a mentorship program for stewards

GOAL D: Govern and Manage for Quality Results

STRATEGIES	ACTIVITIES
Update and modernize the Constitution	<ul style="list-style-type: none">17. Dedicate resources to update and streamline the Constitution<ul style="list-style-type: none">○ This will require approval from Convention and a broad consultation process
Strategically address the critical succession issues facing the BCFMWU	<ul style="list-style-type: none">18. Develop and implement a succession plan for the BCFMWU. Key elements of the succession planning process should include the following activities.<ul style="list-style-type: none">○ Engage professional services to assist in the development of the succession plan, as needed○ Prepare a template which will be used by locals to clearly document key processes that are essential to the business continuity of the local and the BCFMWU<ul style="list-style-type: none">▪ Note that Local 1 is currently developing this type of template; the BCFMWU should consider rolling this template out to all locals○ Prepare job descriptions for key positions, including duties and expectations (note that the new Local Planning Tool Kit provides guidance on this)○ With oversight provided by the LROs and local presidents, prepare for the effective hand-over of information for the benefit of the overall membership: by-laws, list of grievances, procedures, plans, etc.○ Provide guidance in the Local Planning Toolkit for the development of action plans at the local level that:<ul style="list-style-type: none">▪ Identify members that have the potential to fill key positions▪ Define an attraction and training strategy for these targeted members19. Ensure that adequate LRO relief training is in place to support collective bargaining
Enhance the effectiveness and accountability of joint committees	<ul style="list-style-type: none">20. Formalize the structure, terms of reference and reporting framework for all committees<ul style="list-style-type: none">○ Assess what staff resources are appropriate for Union Committees○ Ensure existing terms of reference for each committee are current and relevant, and clearly articulate the mandate for each committee<ul style="list-style-type: none">▪ The Provincial Executive should provide direction on the development or revision of terms of reference and this direction should be consistent with the BCFMWU Strategic Plan▪ The Provincial Executive should formally approve the terms of reference, and any revisions to the terms of reference○ Ensure the terms of reference include a reporting component that defines:<ul style="list-style-type: none">▪ The types of activities that should be included in a report▪ The structure of the report▪ The frequency and audience for the report21. Ensure that the Safety Committees are effective and have active union representation (also included under Goal C)22. Review the value of each committee on an annual basis to determine if the committee

GOAL D: Govern and Manage for Quality Results

STRATEGIES	ACTIVITIES
Enhance the effectiveness of financial planning and reviews	should continue, be re-structured, re-purposed or be eliminated
	<p>23. Establish a formalized and rigorous process for annual budget planning and review</p> <ul style="list-style-type: none">○ Conduct an annual meeting with the BCFMWU's accounting firm to review past performance, cash flow status and key financial risks that need to be managed○ Accurately forecast the cost of key events and investments for the upcoming year, and ensure that these investments are consistent with the priorities of the BCFMWU and its members○ Carefully assess the value of conducting certain events, to ensure that the investment in each event benefits the BCFMWU as a whole○ Ensure that a contingency fund is established and maintained to address unplanned needs as they arise○ Ensure that the Finance Committee monitors, reviews and reports out on budget status on a semi-annual basis, and recommends adjustments, if needed <p>24. Develop a Budget Policy Manual (eventually reference this as Article 19, Section 6 (b) of the Constitution)</p> <ul style="list-style-type: none">○ Ensure that the Budget Policy Manual emphasizes the need to:<ul style="list-style-type: none">▪ Identify "fixed" versus "variable" costs▪ Identify the "fixed" costs as core (untouchable) costs

GOAL E: Ensure the Collective Bargaining Process is Effective

STRATEGIES	ACTIVITIES
Formalize a standard process and associated timelines to be used to prepare for collective bargaining	<ul style="list-style-type: none">25. Select the central negotiating committee early<ul style="list-style-type: none">○ Start the selection process one year prior to bargaining○ Identify alternates○ Schedule “booked off” time26. Provide training for the bargaining team shortly after the team is identified27. Prepare logistical plan to support Bargaining28. Identify priorities and resolutions for the Bargaining Conference29. Determine and manage staff workload during and following the bargaining process<ul style="list-style-type: none">○ Use relief LROs to manage this30. Labour relations staff to organize and assess the bargaining proposals immediately after the Bargaining Conference<ul style="list-style-type: none">○ Proposals must be reviewed and revised

5. Measuring Success

Suggestions with regard to how to monitor progress and measure results are provided below for each of the 30 activities. The “output” simply states the physical evidence that the activity has been implemented. The intended outcomes state what we are trying to achieve through the implementation of the activity. The measurement column includes ways that the achievement of the intended outcome can be estimated. In some instances, the qualitative nature of the activity and its results may make it challenging to truly measure. Also, the resources required to measure results should be weighed against the benefit of understanding the impacts. These are decisions that the BCFMWU will need to make.

GOAL A: Ensure the Membership is Well-Informed and Engaged

ACTIVITIES	Output	Intended Outcome	Measurement
1. Design and implement a formal orientation and ongoing engagement process for “new hires”.	<ul style="list-style-type: none"> Process designed and implemented 	Better awareness and appreciation of BCFMWU amongst “new hires”	Simple annual survey to gauge changes in awareness and appreciation
2. Ensure “new hires” are aware of quarterly local membership meetings.	<ul style="list-style-type: none"> Notification about quarterly meetings Higher attendance by new hires at local meetings 	Better awareness and appreciation of BCFMWU amongst “new hires”	Simple annual survey to gauge changes in awareness and appreciation
3. Design and implement an internal communication plan aimed at the diverse target audiences of the BCFMWU.	<ul style="list-style-type: none"> Communication professional assigned/hired New tools Enhancement of existing tools Relevant content Semi-annual surveys 	Better engagement of membership	Focus group with a sample of members each year to gauge progress in engagement
4. Direct the Provincial Executive to ensure that each BCFMWU committee includes a diverse mix of members that reflects the membership population (including creating an equity-seeking position on each committee, if appropriate)	<ul style="list-style-type: none"> New policy that ensures opportunities for diverse cross-section of members on committees 	Better engagement of diverse membership	Active involvement of diverse interests on committees and in BCFMWU member events
5. Hold regular “touching base” meetings with each “new hire” for the first year of employment	<ul style="list-style-type: none"> Meetings scheduled and held 	Better awareness and appreciation of BCFMWU amongst new hires	Simple annual survey to gauge changes in awareness and appreciation (combine with survey in #1)
6. Provide incentives that will	<ul style="list-style-type: none"> Guest speakers at local 	Better attendance	Change in the number

GOAL A: Ensure the Membership is Well-Informed and Engaged

ACTIVITIES	Output	Intended Outcome	Measurement
encourage stronger attendance at local meetings	<ul style="list-style-type: none"> meetings Draw prizes awarded Use of appropriate facilities for meetings Meetings scheduled at convenient times Provision of other incentives 	at local meetings, resulting in better engagement	of members attending local meetings
7. Host special events at locals at key points during the year	<ul style="list-style-type: none"> Special events hosted (e.g., family fun days) 	Better engagement of membership	Focus group with a sample of members each year to gauge progress in engagement

GOAL B: Develop and Encourage Informed and Supportive Communities

ACTIVITIES	Output	Intended Outcome	Measurement
8. Ensure that the appropriate committee (e.g., could be the Solidarity Committee) continues to develop an annual schedule, with local level input, for supporting targeted events that are external to the BCFMWU	<ul style="list-style-type: none"> Annual schedule created for targeting community events that BCFMWU locals will support 	<p>BCFMWU support for targeted community events</p> <p>Demonstrated support from BCFMWU for targeted communities, resulting in increased awareness about the value of BCFMWU</p>	Observations by the communications professional and BCFMWU members about local communities and their awareness about BCFMWU
9. Design and implement an external communication plan supported by PE that is aimed at increasing awareness about the value of the BCFMWU to the communities in which our union operates.	<ul style="list-style-type: none"> Communication professional(s) hired/ assigned Communication tools, content and special events aimed at building awareness in communities developed and implemented PE support 	<p>Increased awareness about the value of BCFMWU within targeted communities</p>	Observations by the communications professional and BCFMWU members about local communities and their awareness about BCFMWU

GOAL C: Strengthen and Defend the Collective Agreement

ACTIVITIES	Output	Intended Outcome	Measurement
10. Increase awareness about successful outcomes (only where privacy is not an issue)	<ul style="list-style-type: none"> Local wins posted on website and quarterly newsletters (only if appropriate) Done in a manner that does not cast a negative light on the Company (BC Ferry Services Inc.) 	Greater awareness about the effectiveness of the BCFMWU, resulting in a stronger collective agreement	Observations by local presidents about member attitudes toward the collective agreement and its effectiveness
11. Ensure that the Safety Committees are effective and have active union representation (also included under Goal D)	<ul style="list-style-type: none"> Safety Committee action Active union representation 	Better compliance	Evidence of policy resulting in better compliance
12. Ensure that Union Management Consultations (“UMC”) are timely and effective and include staff representatives	<ul style="list-style-type: none"> UMCs conducted in a timely and effective manner 	More effective consultations	Evidence of timely and effective UMCs
13. Ensure the Labour Relations Officers’ (“LRO”) support is effective and quick	<ul style="list-style-type: none"> Incentives to increase the speed and effectiveness of LROs 	Increased speed and effectiveness of LRO support	Record and compare how expedient and thorough LROs are
14. Encourage locals to use the new “Local Planning Tool Kit” with the assistance of LROs	<ul style="list-style-type: none"> Use of Local Planning Tool Kit 	Better and proactive planning by locals	Evidence of local plans that are created and implemented
15. Provide opportunities for members to meet and interact with the Provincial Executive	<ul style="list-style-type: none"> Local presidents identifying most active shop stewards and inviting them to PE meetings as observers Events to ensure one-on-one communication Visits by PEO members to locals 	Better engagement of membership	Focus group with a sample of members each year to gauge progress in engagement
16. Create and implement a mentorship program for “new hires”	<ul style="list-style-type: none"> Process designed and implemented 	Better career engagement of “new hires”	Comparison of “new hire” retention rates and career evolution year-over-year

GOAL D: Govern and Manage for Quality Results

ACTIVITIES	Output	Intended Outcome	Measurement
17. Dedicate resources to update and streamline the Constitution	<ul style="list-style-type: none"> • Resources identified in budget • Process defined to update the Constitution 	Updated constitution	Creation of updated, streamlined constitution that is relevant to BCFMWU
18. Develop and implement a succession plan for the BCFMWU	<ul style="list-style-type: none"> • Professional services engaged (if needed) • Template which will be used by locals to clearly document key processes that are essential to the business continuity of the local and the BCFMWU created and used (possibly use the template that Local 1 is developing) • Job descriptions (new Local Planning Toolkit can provide guidance on this) • Plan prepared for the effective hand-over of key information • Action plan prepared at the local level that: <ul style="list-style-type: none"> a. Identifies members that have the potential to fill key positions b. Defines an attraction and training strategy for targeted members 	Effective succession planning for the BCFMWU	Evidence that key positions are filled by younger, well-qualified members in a timely manner
19. Ensure that adequate LRO relief training is in place to support collective bargaining	<ul style="list-style-type: none"> • Scheduling and provision of LRO relief training 	Trained relief LROs	More effective and efficient bargaining process
20. Formalize the structure,	<ul style="list-style-type: none"> • Formalized structure, 	More effective	Feedback from PE, local

GOAL D: Govern and Manage for Quality Results

ACTIVITIES	Output	Intended Outcome	Measurement
terms of reference and reporting framework for all committees	terms of reference and reporting framework	committees and greater awareness about the results of committee work	presidents. and other members about their view on the effectiveness of committees
21. Ensure that the Safety Committees are effective and have active union representation (also included under Goal C)	<ul style="list-style-type: none"> Safety Committee action Active union representation 	Better compliance	Evidence of policy resulting in better compliance
22. Review the value of each committee on an annual basis to determine if the committee should continue, be re-structured or be eliminated	<ul style="list-style-type: none"> Committees reviewed annually 	More relevant and effective committees	Feedback from PE, local presidents. and other members about their view on the effectiveness of committees
23. Establish a formalized and rigorous process for annual budget planning and review	<ul style="list-style-type: none"> Annual meeting conducted with the BCFMWU's accounting firm to review past performance, cash flow status and key financial risks that need to be managed Forecasting the cost of key events and investments for the upcoming year occurs Careful assessment of the value of conducting certain events, to ensure that the investment in each event benefits the BCFMWU as a whole occurs Contingency fund established and maintained to address unplanned needs as they arise Finance Committee monitors, reviews and reports out on budget status on a semi-annual basis, and recommends adjustments, if 	<p>More thoughtful and forward-looking budgeting which supports better financial decisions</p> <p>Greater awareness about the BCFMWU's cash flow position, and associated risks</p> <p>Contingency fund in place</p>	Finance Committee to monitor progress with regard to budget planning and report to PE

GOAL D: Govern and Manage for Quality Results

ACTIVITIES	Output	Intended Outcome	Measurement
	needed		
24. Develop a Budget Policy Manual (eventually reference this as Article 19, Section 6 (b) of the Constitution)	<ul style="list-style-type: none"> Budget Policy Manual Referenced in Constitution 	Clearly defined policies around budgeting, including fixed and variable costs Protection of core budget items	Financial staff and PE indication that there is more clarity and certainty regarding budget policies

GOAL E: Ensure the Collective Bargaining Process is Effective

ACTIVITIES	Output	Intended Outcome	Measurement
25. Select the negotiating committee early	<ul style="list-style-type: none"> Selection process starts one year in advance Alternates identified “Booked off” time scheduled 	Sufficient time to prepare for collective bargaining	See output items
26. Provide training for the bargaining team shortly after the team is identified	<ul style="list-style-type: none"> Training program designed and delivered 	More effective and efficient contributions by the bargaining team	See output items
27. Prepare logistical plan to support bargaining	<ul style="list-style-type: none"> Checklist to guide the development of the logistical plan 	More effective and efficient Bargaining process	See output items
28. Identify priorities and resolutions for the bargaining process	<ul style="list-style-type: none"> Priorities and resolutions identified 	More systematic preparation for bargaining	See output items
29. Determine and manage staff workload during and following the bargaining process	<ul style="list-style-type: none"> Use of relief LROs to manage this Time dedicated to manage workloads 	Balanced workloads	Ask people about how balanced their workloads are during this period
30. Labour relations staff to organize and assess the bargaining proposals immediately after the Bargaining Conference	<ul style="list-style-type: none"> Bargaining team meets regularly after each Convention Bargaining proposals are organized, assessed and prioritized 	More systematic preparation for bargaining	See output items

6. Moving Forward

This strategic plan is the foundation of how BCFMWU will conduct our operations and demonstrate accountability to our stakeholders over the next five years. The plan presents our purpose (mandate), vision, guiding values, goals, and key activities, and how we will track and measure results. It will be the framework within which we will prepare our annual business plans.

Several steps need to occur to implement the strategic plan.

- One individual should be assigned responsibility for overseeing the implementation and periodic updating of the strategic plan.
- Each committee should be assigned to oversee specific strategies and their associated activities
- Each year, the goals, strategies and activities should be reviewed to determine priorities.
- A budget that defines the time and financial resources to implement priority activities should be developed to determine if the implementation of the priority actions can occur. For those items that are considered critical, the appropriate resources need to be dedicated to ensuring those activities are implemented.
- An implementation plan for the selected activities should be prepared and should include:
 - Roles and responsibilities;
 - Timelines; and,
 - Resources required.
- Key activities should then be built into annual business plans.