



Strategic Plan

November 2009

This is a living document that is updated annually and projects a three to five year time horizon. We encourage your suggestions

Revised Business Plan 2009

Long Term Goals

- This document defines a strategic business plan for the future of Local 146 that promotes and supports the following long term-goals:
- The Boilermakers will **provide industry leadership** and are recognized as a **world class** union of the future.
- The Boilermakers are recognized as the **preferred source** of **highly skilled, safe, reliable and productive** trades people for owners and contractors.
- The Boilermakers are recognized as a progressive union that is committed to **leadership development** and **lifelong learning** for its members.
- The Boilermakers are the **union of choice** for those workers with excellent trade skills that seek union affiliation
- The Boilermaker Union exemplifies “**true brotherhood**” through a fully **informed, inclusive, democratic and participative** membership. **Unity is demonstrated** through each member being personally accountable and responsible to do what we inherently know is the “**right thing**”.

“If we are to fully achieve these goals we must recognize the need to be able to adapt to a changing and extremely competitive industry. Flexibility and innovation are the keys to survival. We must cultivate an organization of leaders that believes in and understands the true meaning of “value” for its customers, which in return, will reward its own members. We must provide the leadership and tools, via education and training, to re-invent ourselves as union members and our relationships with industry stakeholders. We must make all members aware of the vision and collectively reinforce these beliefs at every opportunity.”

Revised Business Plan 2009

Values

- Change and organizational growth will thrive with each member assuming personal responsibility and accountability for their own actions. Our actions should be based on a set of shared values that are applied consistently to the business strategies. These values were established through a membership survey from 2002:
- A **safe and secure** workplace (including stability of jobs and market share)
- **Fair and equitable** wages and benefits for a fair days work
- **Pride, professionalism, and respect** as trades people (amongst owners, contractors and **ourselves**)
- Being able to **deliver the goods** through quality work (conscientiousness and awareness)
- Having a **sense of brotherhood, belonging and loyalty** to each other and the organization (brothers keeper concept and sharing the wealth)
- Recognizing the importance of **autonomy and self governance** as an organization

Strategies

- The business plan is based on four strategic intentions. The strategies support the **long term goals (Vision)** of the organization. The short and mid term objectives are ongoing activities that will need to happen to realize these goals. Being a living document some objectives and priorities may change from year to year and some may not. The long term goals and supporting strategies are foundations and should not change substantially from year to year. This will provide organizational strength and stability.

Strategy One: Develop Organizational Excellence

- This strategy involves gaining the confidence of industry stakeholders and most importantly the Local 146 membership through the demonstration of sound business practices, principals and procedures. This requires accountability of the current administration and elected executive through strong visible leadership. There should be hard evidence of growth, progress, improvements and change. Consistently following and applying the organizational rules and leading by example is imperative to build trust and credibility within the industry.

Develop Organizational Excellence

Short and Mid Term Objectives:

- Provide a well defined business strategy that includes long term goals and strategies. An annual review of the strategic plan is a critical element for our future success. (complete and ongoing for six years)
- Implement the development of Local 146 policies and procedure manual, including roles and responsibilities for all positions and staff. (ongoing)

Develop Organizational Excellence

Short and Mid Term Objectives:

- Fiscal accountability will be achieved through the preparation of an annual budget for benchmarking and monitoring performance. This will provide a benchmark for performance and future expenditures and expenses. (complete and ongoing for six years)
- A clearly defined investment strategy for surplus assets is required to preserve our principle assets and assure the best possible returns. (complete and ongoing for four years)

Develop Organizational Excellence

Short and Mid Term Objectives:

- Provide strong, visible and accessible union representation on and off the job with the participation of a fair and impartial executive. (ongoing)
- Development of more effective and efficient administrative systems and required support services. (ongoing)

Develop Organizational Excellence

Short and Mid Term Objectives:

- Continue to develop our jurisdictional library and resources to support boilermaker mark-ups and submissions (ongoing)
- Evaluate, research and recommend a new operating system for Local 146 that will incorporate improved online services for members and manage all facets of operations including electronic display in dispatch.
(implementation target January 2010)

Strategy Two: Promote the Boilermaker Advantage

- We will be the supplier of choice for owners and contractors for skilled heavy industrial construction and maintenance trades people. The Boilermaker Union recognizes that owners and contractors require dependable, competent and productive trades people that will complete jobs safely, on time and on budget. In this new competitive environment we will commit to an innovative approach to work that requires out of the box thinking to ensure our ongoing competitive advantage.

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- Equip and educate our own members to market our union by living by the terms, conditions and intentions of our collective agreements and contracts. Encourage education, problem solving and innovation amongst our members to provide value added grass roots solutions to industry challenges. (ongoing)

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- Prepare members and stewards to act as job site ambassadors for the union with members and contractor. Support and promote internal steward training for all members to provide timely and available training. Follow through with Master Steward certification (Level 2 and 3) which would include A&D, OH&S, jurisdiction, labour law, and leadership development. (complete and ongoing)

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- Encourage Western Canadian tripartite relationships that facilitates the cooperation and input of all stakeholders.
Work on key owner partnerships (ongoing)
- Work on bargaining relationships to improve quality of life, attraction and retention issues for the membership through ongoing bargaining outside of traditional collective bargaining timelines (such as subsistence, camp and travel conditions and fair compensation)
(ongoing)

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- More effective use of the ABTC relationship giving priority to marketing, organizing, political action and training and education. (ongoing)

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- Create awareness and market the boilermaker advantage. Create and implement new organizing strategies. Look at new and more effective methods of marketing to include media billboards, brochures and possible boilermaker video. Increased use of media such as newspaper, TV and radio? Use the internet to push marketing and recruitment. (ongoing) Capitalize on public initiatives such as show and shine, operation rednose and other special events to promote the organization, (trade shows, school marketing programs and open houses across Alberta) focusing on recruitment from non-union sector.

Promote the Boilermaker Advantage

Short and Mid Term Objectives:

- Work on a more competitive dues structure that will assist in attraction and retention.
- Work on creating a comprehensive member benefits program or a members rewards/incentive program. (insurance and retail and other community services partners) (in progress)

Strategy Three: Advocate Education, Training and Apprenticeship

- The Boilermaker Learning Centre is a world class facility that promotes life-long and self-directed learning that is accessible and accommodates the schedules of the learners. Develop flexible leading edge training capability to accommodate the growing and constantly changing needs of our industry that includes the boilermaker organization, our membership and our client/contractor community. This will enhance the marketability of our organization, employability of our members, and our ability to attract and retain members.

Advocate Education, Training and Apprenticeship

- Collectively we will support apprenticeship development, and the Boilermaker Apprenticeship Administration Agency to ensure an adequate source and quality of candidates to supply the needs for our future. Local 146 will provide strong leadership and a firm hand for apprentices to develop the right attitude towards work ethic and the union from the start of their career.

Advocate Education, Training and Apprenticeship

Short and Mid Term Objectives:

- Continue to develop programs and increase the capacity of our learning facilities. Maximize utilization of training centre and **increase voluntary participation** in training through flexible and relevant training content and schedules that accommodates the availability of the learner. Make training easy by ensuring adequate supply of modern tools and equipment in good working condition with the best possible instructional staff.
(ongoing)

Advocate Education, Training and Apprenticeship

Short and Mid Term Objectives:

- Provide a spectrum of training including: trade skills, technical information, leadership, and unionism for all members. **Promote in-house and easily accessible leadership and supervisory training.** Priority will now be given to mechanical program development and delivery with an additional emphasis on rigging. **Develop a proposal to finalize construction of new rigging and mechanical facilities in Edmonton. (ongoing)**
- Ensure adequate Instructional staffing levels for required service. Ensure instructional team maintains expertise through constant upgrading, training and personal development. **(ongoing)** Support personal development and self-directed learning initiatives for members and staff through **individual learning plans. (ongoing)**

Advocate Education, Training and Apprenticeship

Short and Mid Term Objectives:

- Promote and advertise boilermaker trade as a first-choice career. Apprenticeship program leadership and innovation in selection, recruitment and training. Increase and build pre-apprenticeship training initiatives. (WBF, Tradewinds) (ARIS and *Worksmart*) Promote field level involvement and working relationships between the apprentice community and the administration. (Mentoring and apprentice reports) Use Career Awareness site and increase apprenticeship intake to align with demographic trends. Increase apprentice intake by 50% for 2007-2009 (complete and ongoing)

Advocate Education, Training and Apprenticeship

Short and Mid Term Objectives:

- Develop and deliver membership seminars on topics such as Health and Safety (A and D, WCB, OH and S), Financial Management, Etc.
- Develop comprehensive membership health management program that focuses on educating the medical community (physicians toolkit)
- Consider additional union sponsored and delivered mandatory classes for apprentices to include stewardship, financial and leadership programs

Strategy Four: Build Pride in Membership

- We will build trust and hope for the future by promoting ownership, participation, and involvement of the membership within a changing union environment. Decisions based on solidarity, equality, democracy and union values are easy to make because the membership has accepted individual responsibility to make the right choices and do the right thing for the good and strength of the majority. Each and every member needs to adopt personal accountability for upholding the laws and rules of this brotherhood. Only the diligence and persistence of the membership can provide the tipping point for change.

Build Pride in Membership

Short and Mid Term Objectives:

- Foster an open, engaging and inclusive democratic process through providing opportunities for members to build relationships, socialize and interact with one another. Create strong union leadership at all levels with a focus on reorganizing the organized by promoting steward and stewardship training and **union/labour movement history education** for the entire membership. **Develop a “Union History” orientation program that will strengthen member participation in activities such as union meetings and Local Lodge elections.**

Build Pride in Membership

Short and Mid Term Objectives:

- Establish a program that promotes accountability of our own members and which ensures consistent application of the rules and bylaws. Foster a sense of pride in the organization by encouraging our members to be held accountable to each other in accordance with the will of the majority and promote education for those that need help. (currently underway and in progress)
- Continue to develop and bolster our membership advisory committee structure (education and training, membership selection, political action, shop steward, retired members, members in need, visitation and peer review?)

Build Pride in Membership

Short and Mid Term Objectives:

- Maintain and follow through with new member intake protocol. (ongoing) Develop new sources of quality recruitment such as military, aboriginal and vocational school programs. Increase these initiatives in the Calgary area. Continue to build the new member orientation programs and new member information kits with a possible senior member sponsor/mentor program.
- Continue to build relations with shops and members in Calgary. Invest in ownership in Calgary. Complete the new construction plans for Calgary (complete)

Build Pride in Membership

Short and Mid Term Objectives:

- Implement video conferencing between Calgary, Edmonton and Ft McMurray. (complete)
- Build on the existing communication infrastructure. (ongoing) (website, expander, callout, special called meetings, online and print surveys and use of Union Calling service)
- Use available resources to support and increase our political influence profile. Political action committee and political involvement should become a priority for all members of Local 146. (ongoing)