



ACEP CAPE

SUMMARY
NEC STRATEGIC
WORKSHOP
2021



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Background

The Canadian Association of Professional Employees (CAPE) hosted a two-day strategic workshop on September 16 and 17, 2021 bringing together members of the National Executive Committee (NEC) elected in the 2020 national election, as well as members of the management team.

The general purpose of the strategic workshop was to:

- (1) identify a **direction** for the organization and prioritize steps to the end of the mandate of the current NEC. More specifically, the workshop helped to identify the most urgent matters for the organization to address in the near- to mid-term, to prioritize actions required and to inform future costing and financial planning.
- (2) The workshop was also intended to promote **learning** as well as **team building** through activities and discussions focused on common goals, values and team culture.

The workshop was built around the outcomes of the February 2019 planning workshop held with members of the previous NEC, combined with the results of a survey shared with NEC members prior to the workshop and with operational priorities proposed by the management team. Those priorities were produced during a management operational planning meeting held on June 10 and 11, 2021.

While the design of the workshop was inspired by past strategic discussions, the specific focus and points for discussion in charting the future course for CAPE were mainly informed by results from the survey distributed to NEC members to ensure the retreat was reflective of their input and expectations and of CAPE's current context and reality.

The workshop showed that members of the NEC and the management team share a common interest in investing more time, energy and resources towards building an association that is best equipped to provide its members with expected quality support and services.

Members of the NEC and of the management team recognized that CAPE has reached a new stage of growth and development and that its role in the national union community has significantly evolved. This came with an acknowledgement that more and new skills, competencies and resources were critically needed to keep up with the demand, to empower its local leadership and volunteers, to better adapt to an ever-changing environment, and to be more effective in supporting collective efforts to drive better human rights, diversity and inclusion outcomes in the federal workplace.

I. NEC Main Priorities

The two-day meeting culminated into three main priorities to achieve over the course of the NEC's current mandate. Those objectives complement, expand upon and/or reinforce the management's proposed 10 priorities, detailed in the next section.

The NEC's main priorities include:

1. Bolstering membership representation

- Focus on reviewing CAPE’s organizational structure to ensure adequate staffing levels to respond to the needs of its members and the best organizational structure in place to ensure timely, consistent and high-quality support to members;
- Establish review mechanisms to obtain membership feedback on the services provided;
- Increase reporting to the NEC regarding membership representation;
- Assess whether a dues increase is required to ensure the funds are sufficient to provide for the proper level of service.

2. Empowering local leadership

- Focus on providing Locals with tools and resources needed to meet their objectives.
- Ensure adequate training and support is provided to local leadership.
- Reactivate inactive locals and support the creation of new ones.

3. Boost NEC effectiveness

- Identify measures to ensure the NEC functions in a cohesive manner.
- Explore virtual collaborative platforms to enable NEC members to engage in ongoing collaborations and exchanges between NEC meetings.

II. Management Operational Priorities

Prior to the NEC strategic workshop, the management team along with the president of CAPE and the two vice-presidents participated in a management operational planning meeting in June 2021 to identify areas of work that needed to be prioritized to ensure CAPE met its operational mandate. The priorities were presented to the NEC at the strategic workshop and contributed to help shape the NEC’s top three priorities, as a complement.

The NEC endorsed the organizational priorities established by the management team for the Fiscal year starting on May 1, 2021 and ending April 3, 2022, and are summarized as follows:

1. **Membership representation and legal advocacy:** Ensure resources are provided to ensure all members, equity-deserving groups and others alike, continue to receive equal, fair, quality and timely labour support when needed;
2. **Collective bargaining:** Ensure a process that is swift, timely and builds on members’ chosen priorities established through consultations;
3. **Communication:** Ensure timely sharing of useful information and knowledge with members;
4. **Advocacy:** Ensure campaigns are carried out to strengthen CAPE and to advance members’ interests in various fora;
5. **Stakeholder engagement:** Ensure continued collaboration and engagement within National Joint Council, other bargaining agents, the Treasury Board Secretariat and government officials;
6. **Education and training:** Ensure education and training programs and products are developed as to meet growing needs and to deliver optimal value for the entire membership;
7. **Policy and procedures:** Ensure the adoptions or improvement of policies and procedures to meet standard operating procedures requirements for sound management and oversight;
8. **NEC Support:** Ensure NEC members are provided with all the support needed to play their fiduciary role effectively and for the NEC to achieve its mid and long terms objectives;

9. **Human resources:** Ensure review of talent needs and staffing and succession requirements.
10. **CAPE workplace management:** Ensure attention is given to office relocation and redesign to meet space and technology needs, and health and safety standards for eventual phased return to workplace;

III. Next Steps

The NEC and the management team agreed over an implementation timeline and to a quarterly reporting process designed to stay on course to achieve the agreed priorities and objectives. There was also agreement over the need to add the required resources in the budget proposal 2022-23 as to ensure the activities necessary to support the achievement of those priorities are properly financed.