



**PUBLIC SERVICE ALLIANCE OF CANADA  
ONTARIO REGION**

**ALLIANCE FACILITATOR NETWORK  
POLICY**

**FOR THE ONTARIO REGION AFN  
MEMBERSHIP EDUCATION PROGRAM**

Adopted by Regional Council – March 2014

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## A message from the Regional Executive Vice-President

Education is a key element in building a strong union. By training and empowering members, we build an activist base that is knowledgeable and ready to protect our rights.

To do this, our education program must be creative, engaging and dynamic in addressing the ever changing needs of our membership and the issues that we face.

Our union is proud to be member driven, and the Alliance Facilitators Network (AFN) continues this tradition. Members are trained and given the tools to become facilitators themselves; increasing our capacity to meet a Local's education and development needs.

Our objectives with the AFN program are to:

- Build our members capacity through union education
- Give members the tools and resources to protect and empower themselves
- Use union education as a mobilizing force for training activists

Members who participate in the AFN gain valuable skills in researching and developing course materials, facilitation skills and knowledge in labour issues. The AFN also provides a member to member training framework that helps to engage our locals and build our capacity for collective action.

PSAC offers an Alliance Facilitator Training Program (AFTP) that provides members who wish to be part of the AFN the skills and training necessary to become labour educators.

Alliance Facilitators can be expected to:

- Organize, develop and deliver educational activities in the local and regional structures;
- Provide members with the appropriate training necessary to build strong, active, informed locals;
- Provide training for Human Rights Committees and Area Councils;
- Be a facilitator at a Component or PSAC regional or national conferences

With an effective and member-led education program we can continue to strengthen our union by providing the tools our members need.

In Solidarity,

Sharon DeSousa  
PSAC Regional Executive Vice-President – Ontario

## **OBJECTIVES OF THE PSAC ONTARIO ALLIANCE FACILITATORS' NETWORK**

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- To provide members with local-based and geographic based union training opportunities organized, developed and delivered by members trained as Alliance Facilitators (AFs) in accordance with their roles and responsibilities;
- To provide interested members committed to union education with the appropriate training necessary for them to become effective AFs;
- To support AFs in their role to build strong, active, informed locals and regional committees;
- To offer support mechanisms and resources instrumental in establishing regional networks of AFs;
- To involve AFs in the delivery of the regional education program.

## **BECOMING AN ALLIANCE FACILITATOR**

### **Alliance Facilitator Network**

To become an Alliance Facilitator members must either complete the Alliance Facilitator Training Program (AFTP) or a program equivalency and then must complete the remaining steps of the certification process to be placed on the Alliance Facilitator Network (AFN) directory.

### **The Learning Objectives of the AFTP:**

The principles of union education:

- How people learn, the elements of an effective learning experience;
- How to identify learning needs and establish objectives;
- How to plan a short seminar;
- How to choose and use various techniques and aids such as discussions, interactive lectures, role plays, videos and flipcharts;
- How to foster positive group dynamics and handle problems in the classroom;

### **Recruitment of participants for the AFTP**

The AFN should be representative of the membership (e.g. equity, geographic, component/ directly chartered local affiliation, young worker...). It is the responsibility of the organization i.e. Regional Staff Representatives, Regional Education Officer and Regional Council, to recruit candidates for AFTP training opportunities.

## **Method of choosing Participants for the AFTP**

A call out letter will be sent throughout the region encouraging member participation. The letter will include the selection criteria, deadline for application and the number of of available spaces allocated for each Regional Offices (RO) servicing area.

### **Selection of Participants**

1. Each RO will advise applicable Regional Council Members in their servicing area and set a date for a consultative conference call for planning purposes at the time of the AFTP call out letter.
2. Within one week of the application deadline Regional Representatives and the Regional Council Consultative Group in each of the servicing areas will discuss via conference call or in person their recommendations based on the application information and selection criteria. Only Regional Representatives organizing the learning event will view self-identification information related to accommodation needs.
3. The consultation process will be based on a consensus model. If consensus is not reached, points of difference will be noted for the Regional Executive Vice-President (REVP) and Regional Coordinator (RC) to reconcile in their deliberations.
4. Each RO will send the recommendations to the Regional Education Officer (REO). The REO will then review the Recommended Applicant List for consistency related to the selection criteria before forwarding to the REVP and Regional Coordinator.
5. The REVP and RC will make the final selection of participants.

## **Advising Applicants of Selections**

All applicants will receive a letter informing them that they have been accepted or not and if they have been placed on an Alternates list. These letters will be mailed or emailed to applicants by the Administrative Staff assigned to the AFTP.

## **Ontario Region AFTP Equivalencies**

The following Member Instructor or Member Facilitator Training Programs are all acceptable as equivalencies to the AFTP:

- The PSAC –Treasury Board Joint Learning Program (JLP) Facilitator Training
- Certified Workers Health and Safety Centre (WHSC) Instructor Training
- Certified Occupational and Disability Response Team (ODRT) Instructor Training
- Canadian Labour Congress (CLC) Instructor Training
- AFTP from another PSAC Region

## **Certification Process**

A member is added to the AFN Directory by completing the following steps:

1. A member must first complete either: (A) the AFTP or (B) an equivalent program(s). Program equivalencies are outlined above.
2. A member will then be required to co-facilitate a basic Education Program course or a similar learning event (which must be approved by the REO) to be assessed (See Assessment Form – Appendix “A”). Members will be given opportunities to co-facilitate, within their RO service area, on courses such as:
  - (A) Talking Union Basics
  - (B) Grievance Handling
  - (C) Introduction for Local Officers
  - (D) Comparable learning initiatives & etc

3. The assigned Regional Representative will complete an AF Assessment Form for any members who have completed step two as outlined above. The completed Assessment Form will be provided to the Region Education Officer (see Appendix A~ Assessment Form)
4. The REO reviews the Assessment Form and contacts the member with feedback and to obtain feedback from the member.
5. The REO consults with the Chair of the PSAC Ontario Council Education Committee, the RC and Regional Representative(s) to obtain any additional relevant feedback.
6. The REO makes the decision whether to add the member to the AFN directory.
7. The REO advises the member whether or not s(he) will be added to the AFN directory.
8. If the member is added to the AFN directory, the REO will advise the Administrative Staff accordingly to add their name to the regional AFN directory. The REO will also advise Regional Representatives within the applicable RO that the AFN directory has been updated with a member within their service area. PSAC Ontario Council's Education Committee will be updated with all changes to the AFN Directory by the REO.
9. If the member is not added to the AFN directory, then a member can request to repeat the co-facilitation step to be re-assessed. The decision to grant a request by a member to repeat any of these steps will be determined by the REO in consultation with the AF and the Regional Representative(s) involved.



## **The AFN Directory:**

The AFN Directory is a list of certified Alliance Facilitators. The directory is used to identify AFs to:

- co-facilitate education courses;
- co-facilitate learning events;
- facilitate AF learning activities;

The AFN Directory will be updated on an on-going basis by the REO. It will contain the name of the AF, component/ directly chartered local, RO Servicing area and their certifications (e.g. AFTP, ODRT, JLP etc...). Due to the PSAC Privacy Policy the AFN Directory will be kept confidential by PSAC Regional Offices.

## **Ongoing Assessment of AFs**

After every facilitation opportunity, feedback will be provided to the AF by either the assigned Regional Representative and/or the REO. Feedback from participants' evaluations will also be shared with the AF. The assigned AF will also be given an opportunity to provide their feedback on their experience to the Regional Representative and/or the REO. The Assessment Form (see Appendix A) will be used to facilitate this feedback process.

## **AF Upgrading**

AF upgrading and skills development is provided through the AF Clinic. The AF Clinic Budget is part of the Regional Education Plan. The AF Clinic includes a module on design training.

## **Removal of AFs from the AFN Directory**

To ensure the AFN Directory is current and the integrity is maintained, AFs will be removed from the directory for the following reasons:

- Personal request
- Attrition (Retirement, no longer represented by PSAC, does not reside in Ontario, etc.)
- No longer a member in good standing
- After an ongoing assessment as outlined above, the REO decides in consultation with Regional Representative(s), the Regional Coordinator and the Chair of the PSAC Ontario Council Education Committee that an AF be removed from the list
- The AF is found to have contravened PSAC policies and regulations and censored.

## CO-FACILITATION OPPORTUNITIES

AFs co-facilitate courses and learning events along with Regional Representatives and the Regional Education Officer to deliver a membership driven Regional Education Program.

### **OBJECTIVES OF CO-FACILITATION OPPORTUNITIES**

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- To provide coaching and support for skills development and confidence building for AFs on an equitable basis to sustain the program
  - To ensure a representative facilitation team that reflects both the class-room and the membership
  - To provide member-to-member training
  - To provide an opportunity for ongoing assessment of AFs
  - To provide an opportunity to assess members who are seeking to become AFs
- 

### **Co-facilitation opportunities with Regional Office staff are available:**

- through the regional education program (basic educational course offerings and advanced courses such as Geo-based advanced courses or Fall/Winter school)
- other learning events
- Regional Representatives may also include AFs in local or geo-based training initiatives

### **Assignment of AFs for Course Co-facilitation Opportunities:**

AFs will be selected/assigned to co-facilitate based upon the following factors:

- AF is on the AFN Directory or the member requires a facilitation opportunity to be assessed for certification to become an AF

- Desire/ availability of AFs to co-facilitate the proposed course
- Expertise required and experience of AF in the subject area (e.g. Health & Safety, Human Rights, Grievance Handling etc. )
- Representative facilitation team (factors of consideration; gender balance, young worker, equity and nature of course)
- Equitable distribution of co-facilitation opportunities by tracking AFs who have had opportunities

### **How are AFs Assigned?**

The recommendation is made by the Regional Representative(s) (assigned to the education course or learning event) to the REO and the approval is made by the RC. The decision making process should be consistent and transparent for co-facilitation opportunities. The REO will report on an on-going basis to the PSAC Ontario Council Education Committee regarding the assignment of AFs.

## **LOCAL BASED TRAINING OPPORTUNITIES**

Alliance Facilitators provide peer-to-peer training for members in their locals, workplaces and/or communities to bring Union education closer to the membership.

### **Local(s) Based Training Objectives**

- To increase learning opportunities for the membership
- To provide an opportunity for AFs to facilitate
- To increase the capacity of locals to represent members in the workplace
- To engage and mobilize members in political action campaigns such as We Are All Affected
- To respond to the immediate and specific needs of a local by tailoring the content of AF workshops

### **Identifying Local Learning Needs**

A local has made a request for local training; or

Regional Representative has identified a learning need for a local(s) (based upon the Regional Representative's assessment of the extent of the local's development) that can be met through an AF workshop and the local(s) consent to such a workshop; or

Regional Representative has identified a learning need for a local(s) based upon an organization priority such as political action campaigns ie We Are All Affected AF Workshops & etc... and the local(s) consent to such a workshop; or

The Regional Education Officer receives requests in response to communication materials sent to Locals on the AFN

## **Organizing, Planning and Conduct of Local based AF Education Activities**

The delivery of Local Based Training is a collective effort of the REO, Regional Representatives and the Alliance Facilitators.

### **Regional Education Officer (REO)**

The Regional Education Officer provides advice, assistance, encouragement and support to AFs in the planning and conduct of workplace-based education activities. (See Appendix B Funding Proposal Form)

The Regional Education Officer develops and monitors the Alliance Facilitator budget approving expenses related to the AFN and AF activities.

### **Regional Representatives**

Regional Representatives provide ongoing encouragement to Alliance Facilitator to conduct workplace based Union training.

### **Alliance Facilitator (AF)**

Upon the identification of a learning need and the consent the local, AFs organize and develop education activities in the local

## **Geographic Area Training Opportunities**

Alliance Facilitators provide peer-to-peer training for members in their committees, conferences, geographic areas and/or communities to bring Union education closer to the membership.

Geographic Area Training Opportunities refer to AF activities that are delivered to more than one local including:

- regionally-based structures encompassing more than one local such as Regional Council or Council Committees, Area Councils, Equity and Human Rights Committees,
- AF workshops that are delivered at Conferences
- AF workshops that are open to more than one local in a geographic area

## **Geographic Area Training Objectives**

- To increase learning opportunities for the membership
- To provide an opportunity for AFs to facilitate
- To increase the capacity of regionally based political structures
- To bring training opportunities closer to the membership
- To engage and mobilize members in political action campaigns such as We Are All Affected
- To provide peer-to-peer training
- To respond to the immediate and specific needs of regionally-based political structures by tailoring the content of AF workshops

## **Identifying Geographic Area Learning Needs**

A Regionally-based structure or Conference organizing committee has made a request for AF training; or

A Regional Office schedule include an AF learning activity for local within a geographic area

Regional Representatives have identified a learning need for a regionally-based structure for which they are assigned and/or local(s) within their servicing area that can be met through an AF workshop and the consent of the local(s).

The Regional Education Officer receives requests in response communication materials sent to Locals on the AFN.

### **Organizing, Planning and Conduct of Geographic Based AF Education Activities**

The delivery of Geographic Based Training is a collective effort of the REO, Regional Representatives and the Alliance Facilitators.

#### **Regional Education Officer (REO)**

The Regional Education Officer provides advice, assistance, encouragement and support to AFs in the planning and conduct of workplace-based education activities.

The Regional Education Officer develops and monitors the Alliance Facilitator budget including expenses related to the AFN and AF activities.

#### **Regional Representatives**

Regional Representatives provide ongoing encouragement to Alliance Facilitator to conduct workplace based Union training.

Upon the identification of a learning need and the consent the local, AFs organize and develop education activities in the local

#### **Alliance Facilitator (AF)**

Upon the identification of a learning need and the consent the regional committee, learning event organizing committee or the Regional Office, AFs organize and develop education activities in the geographic area



## **Funding the Alliance Facilitator Network**

10% of the overall Regional Education Budget is allocated towards of the Alliance Facilitator Network.

An honorarium is provided in accordance with the National Education Policy to the AF for co-facilitating PSAC Education Program courses with Regional Representatives and/or the REO on a day of rest or weekend or three (3) hour evening course. The honorarium is taxable and PSAC National will issue a T4 to the AF.

A funding proposal for lunch and learn local or geographic based education activities will be submitted to the Regional Education Officer.

## **Communications**

Information about the Ontario Region AFN Program will be promoted directly chartered locals, locals, Components, regional structures (regional equity committees and Area Councils) using various communication tools including the regional Website, AFN bulletin, emails updates, flyers & etc

## **AF RESOURCES:**

The National and Regional Education Programs have developed various resources to support the AFN including:

- Workshop Materials (called 45 minute AF Learning Activities) such as Make Poverty History Workshop, Elections Workshop, Pay Equity Module, Fight back Campaign and other workshops
- AFN Toolkit which is updated regularly by the REO
- Handbooks such as the Facilitators' Handbook, Take Action Handbook, Education on Picket Line, Duty to Accommodate Handbook and others
- USB Keys with course information from AF Clinics, AFTPs, Learning Activities for campaigns and other learning events
- On-Line education training courses for AFs such as the We Are All Affected – Engaging Our Members: One-to-one Conversation Campaign online course
- Textbooks such as PSAC Education for Changing Unions, Facilitator's Guide to Participatory Decision-Making, Facilitation at a Glance
- On-line reference materials accessible through the Regional Education Program

## **Role and Responsibilities**

In order for the AFN to work effectively we must provide substantive support to the AFs within their various roles. The REO takes a lead role of the AFN with the active engagement of Regional Representatives and Alliance Facilitators as follows:

### **Regional Education Officer**

The REO organizes and coordinates the Alliance Facilitators' Network in the region by:

- Maintaining the AFN Directory
- working with regional representatives to identify, recruit and train members who are potential candidates for the AFTP and AFN;
- co-facilitating the AFTP and AF Clinics
- scheduling and conducting facilitator skills training and providing mentoring and feedback to AFs on their skill development;
- coordinating the certification process and assessments;
- organizing and coordinating regular meetings of Alliance Facilitators, as well as the AF Clinic as necessary;
- promoting the AFN to directly chartered locals, locals, Components, regional structures (regional equity committees and Area Councils) using various communication tools including the regional Website, emails updates, flyers & etc...;
- providing advice, assistance, encouragement and support to AFs in the planning and conduct of workplace-based education activities and geo-based education activities

- developing and monitoring a triannual budget for the AFN and AF activities, meetings and clinics as approved in the education plan by PSAC Ontario Council;
- coordinating the development and distribution of the AFN Newsletter and ensuring Alliance Facilitators have knowledge of and access to AF Toolkit and materials;
- recommending Alliance Facilitators to conference organizing committees and regional representatives ;
- monitoring the level of activity by AFs and providing recommendations/proposals on ways to improve/enhance the AFN Program.

## **Regional Representatives**

Supports an ongoing and active AFN by:

- recruiting members to become Alliance Facilitators
- providing ongoing encouragement to Alliance Facilitators to conduct workplace and geo-based union training
- recommending Alliance Facilitators to the Regional Education Officer and Regional Coordinator for co-facilitation opportunities within the basic and advanced education course offerings
- provide feedback to the Regional Education Officer and Alliance Facilitators on the facilitation skills of Alliance Facilitators during co-facilitation opportunities for purposes of assessing AFs during the certification process and/or removal process.
- working with conference organizing committees to develop recommendations to the Regional Coordinator for Alliance Facilitator conference assignments

- identify local and geo-based learning needs that can be addressed through the AFN Network
- Assist in maintaining the AFN Directory by advising the Regional Education Officer and affected Regional Office(s) of any changes resulting from retirements, re-location & etc...

### **Alliance Facilitators**

Alliance Facilitators co-facilitate and initiate learning opportunities for the membership by:

- Assist in the design of AF learning activities
- Recruit for AF activities within their own local(s) and/or geographic area learning activities
- Stays connected with other AFs, REO and Regional Representative(s)
- Proactively maintain and develop facilitation skills by engaging in continuing learning opportunities
- Active Union member who has achieved a level of development in the Union
- Provide feedback on the education program and AFN Network following AFN activities
- Facilitate or co-facilitate learning events in a manner creates a safe and respectful learning environment as required by the PSAC Constitution, Regulations and Policies and PSAC Ontario bylaws

### **Regional Coordinator**

- Approve AF assignments to basic and advanced education offerings and conferences
- Provide advice to the REO on the assessment of AFs during the certification and/or removal process

## **PSAC POLICIES**

All PSAC Policies such as accessibility, harassment, no-smoking, no-scents etc. will be adhered to and applied at education and learning events. All who participate in and facilitate at education and learning events are expected to demonstrate union principles and to treat other participants and facilitators with tolerance and respect. To access the PSAC Policies please visit the PSAC National website [www.unionpsac.com](http://www.unionpsac.com)

### **AFN Policy Review**

This Policy is to be reviewed on a triennial basis by the Ontario Regional Council Education Sub-Committee for recommended amendments where necessary and submitted to the Council for approval.

## References:

- *PSAC National Education Policy* Web Link:  
<http://psac.com/what/education/policy-e.shtml>
  - *PSAC National Policies* Web Link:  
<http://psac.com/about/policies/policy-e.shtml>
  - *PSAC Ontario Region AFN* Web Link:  
<http://ontario.psac.com/psac-member-facilitatorsmember-hs-instructors>

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  - *Education for Changing Unions*, Bev Burke et al, Between the Lines, Toronto, 2002 (Chapter 10, Worker Education Programs)
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## Appendix A – Assessment Form

### The PSAC Ontario Region AF Assessment Process

Facilitator development is an ongoing learning process. The AF assessment process takes place after the completion of the AFTP to determine whether he/she will become an Alliance Facilitator and on an ongoing basis after every facilitation opportunity.

During those parts of the course facilitated by the AF candidate or AF (basic or advanced course or similar learning event), the Regional Representative and/or Regional Education Officer should observe the facilitation, and pay particular attention to:

⇒ Did the AF candidate or AF ensure that all participants are included in the learning process?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF encourage diverse points of view to be shared?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF ensure that differences of opinion between one or more participants were respectful and consistent with PSAC policies?

Yes



No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF integrate responses that were different than those suggested in the facilitator notes constructively?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF manage their time effectively based upon the session time suggested in the facilitator notes?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF keep energy levels up?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF provide clear instructions on workshop tasks to avoid confusion or uncertainty among participants?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF ensure that the learning environment is inclusive – of all experiences, abilities, etc.?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF make the learning experience enjoyable for participants?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF bring participants back on track when the topic/subject diverged from the objectives of the course?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF take steps to avoid one participant from dominating the discussion either in small or large group discussions?

Yes

No

Explain: \_\_\_\_\_

⇒ Did the AF candidate or AF take steps to re-engage a participant who was not participating in the learning?

⇒ What else did you observe?

Explain: \_\_\_\_\_

**The end-of-day feedback and observation session:**

The PSAC staff facilitator should offer constructive feedback on what she/he observed about the AF candidate's facilitation. This should include a conversation about the AF candidate's areas of strength and areas for further development. We suggest the AF candidate speaks first i.e. her/his observations of how she/he felt, how well they anticipated what would happen, did they accomplish their objectives, etc., then the PSAC staff facilitator can offer their feedback.

The AF candidate and the staff facilitator can then discuss what the AF candidate observed about specific areas of the facilitation (the questions above).

Finally, the AF candidate and the PSAC staff facilitator are invited to share their observations and decisions with the REO so further planning can be completed.

<b>Alliance Facilitator Name</b>	
<b>AF Educational Activity and Source for Workshop Notes</b>	
<b>Dates</b>	
<b>Delivery Format (lunch and learn, after work, other)</b>	
<b>Last time facilitated</b>	
<b>Goals/Objectives of Training</b>	
<b>Rationale for proposal</b>	
<b>Target Learners</b>	
<b>Is this a new initiative?</b>	
<b>When this educational activity was last offered in the area?</b>	
<b>How does this relate to Local –Based or Geographic Area Learning Needs?</b>	
<b>How does this relate to PSAC Priorities?</b>	
<b>List Materials Needed</b>	

**Authorization:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## AFN Budget Calculation

<b>Family Care Costs per Family Care Policy</b>	
<b>Alliance Facilitator Preparation Costs Pre-Delivery including any LOS</b>	
<b>Alliance Facilitator Course Delivery Expenses per Basic Travel Policy Including LOS</b>	
<b>Meeting Room Costs</b>	
<b>Itemize Materials Costs</b>	
<b>Other Costs</b>	
<b>TOTAL BUDGET</b>	