Contractor Manual

TRAINING AND PROFESSIONAL DEVELOPMENT

ADR Institute of Alberta

COPYRIGHT

All rights reserved. No part of this work may be reproduced or transmitted in any form or by any means, electronic, mechanical, recording, or otherwise, or accessed or used by any information storage and retrieval system. Permission is not given for reproduction of the materials for use in other published works in any form without express written permission from the ADR Institute of Alberta (herein also referred to as ADRIA),

©2016 The ADR Institute of Alberta

Room CE 223A - Ralph King Athletic Centre

7128 Ada Boulevard

Edmonton AB, T5B 4E4

Phone (780) 433-4881 Fax (780) 433-9024

E-Mail: education@adralberta.com

www.adralberta.com

CONTENTS

WELCOME TO ADRIA 6
Using This Manual 6
Your Role as a Contractor 6
Promoting ADR and ADRIA Programs 7
GENERAL CONTRACTOR CONDITIONS 8
POLICIES FOR CONTRACTORS 10
Professional Conduct & Ethics Policy for Contractors 10
Guidelines 10
Copyright Policy 11
Confidentiality of Material and Information 12
ADRIA INSTRUCTIONAL TEAMS 13
Guiding Principles 13
Expectations 13
Use of Course Materials 14
INSTRUCTORS 15
Procedures for New Instructors 15
ADRIC Courses 15
Instructor Responsibilities 15
Instructor Expectations 17
COACHES 18
Procedures for New Coaches 18
ADRIC Courses 18
Coach Responsibilities 19
Coach Expectations 19
Checklist for Coaching a Breakout Group 20
Online Practice Session Coaches 22
Online Coach Responsibilities 22
Online Coach Expectations 22
EVALUATORS – Arbitration Stream 23
Evaluator Responsibilities 23

Copyright 2016 ADR Institute of Alberta

EVALUATORS – Mediation Stream 24
Evaluator Responsibilities 24
ASSESSORS AND SUPERVISORS 25
Chartered Mediator Assessments 25
Qualifications: 25
Responsibilities: 25
Supervised Mock Mediations for Qualified Mediator 26
Qualifications: 26
Responsibilities: 26
ROLE-PLAYERS 27
Qualifications: 27
Responsibilities: 27
Expectations 27
PROVIDING FEEDBACK 28
Coaching For Excellence: USA Models 31
Conflict Pros Coaching Model 31
DEGREES OF COMPETENCE: ADRIA GUIDELINES 32
CONTRACTOR RATES, EXPENSES, AND INVOICING 34
Guidelines for Submitting Invoices 35
Common errors in submitting invoices 36
SPECIALIZED TRAINING COURSES 37
Course Criteria 37
Specialized Training Guidelines 38
Specialized Training Instructor Expectations 38
Rates 39
TRAINING FACILITIES 40
Edmonton 40
Calgary 41
Professional Development Benefits 43
Instructors and Coaches 43
List of Appendices 44

Copyright 2016 ADR Institute of Alberta

WELCOME TO ADRIA

Using This Manual

This manual was originally developed in March 2004 and last updated in August 2016. It pulls together a number of important policies and procedures into one comprehensive package. It is meant as a handy reference for your work with ADR Institute of Alberta (ADRIA). After reading the Contractor Manual, please see Appendix A to sign, scan, and send the contract to education@adralberta.com

Your Role as a Contractor

For the purposes of this manual "Contractor" refers to any individual contracted to ADRIA for the purposes of Training and Professional Development including: instructor, coach, on-line coach, evaluator, assessor, supervisor, or role-player.

The task of being an effective Training and Professional Development Contractor with ADRIA is an important one as can be seen by looking at who you are accountable to. You are accountable to:

- Yourself
- The students
- Other Contractors
- ADRIA
- ADRIC
- The integrity of the course material
- The field of conflict resolution as a profession

This means that you are always 'on' when you are serving as a Contractor and the importance of 'walking the talk' (modeling the values, principles, and skills of the interest-based/understanding-based approach) cannot be over-stressed. You will be working with people from many different walks of life, with many different backgrounds, attitudes, abilities, goals, and reasons for taking the courses. Being effective in such a wide variety of contexts requires the flexibility of Gumby, a lot of focus, energy, attention to detail, a solid grounding in ADRIA and ADRIC course materials, and occasionally great patience. Your job is the same with each student: to assist them on their journey toward integrating the concepts and skills taught in the courses, by providing an embodiment of those concepts and skills in your self-presentation and also by providing feedback that is thorough, honest, respectful, sensitive, and congruent with ADRIA course material.

Promoting ADR and ADRIA Programs

Whenever you work with ADRIA students, it is a golden opportunity to promote ADR processes and the courses offered through ADRIA. The more people know about our program and course offerings, the stronger we can become as a Society, which also supports your work.

You can promote the work of ADRIA and the profession of conflict management by:

- Speaking to the value of ADR processes in a variety of applications (professional, personal).
- Promoting courses coming up, being aware of upcoming events, including ADRIA in-house electives, and referring students to our website. Note: as courses and programs have changed significantly over the last several years, please ensure you provide correct and current information. Current information can be found on our website; browse our site regularly to keep up to date on our programs. Regularly reading our newsletter is another way to stay current on our programs. If you are unsure about programs and course, please direct students to the Education Administrator.
- Promoting the value of designations and encouraging those who plan to become practitioners to obtain a designation.
- Reminding students of the value of joining the on-line mediation skills practice sessions.
- Encouraging students to start their own practice group to reinforce skills taught in class.
- "walking the talk", being professional, referring complaints to ADRIA. All ADRIA members agree to adhere to the ADR Institute of Canada's Code of Ethics. As an education contractor for ADRIA please remember that you are modeling behaviours and attitudes for our students.
- Supporting instructors, coaches, assessors and students

Copyright 2016 ADR Institute of Alberta

GENERAL CONTRACTOR CONDITIONS

- All Training and Professional Development Contractors must be active full ADRIA members in good standing.
- The Contractor's relationship with ADRIA, as created by this agreement, is that of an independent contractor for the purposes of the Income Tax Act (Canada) and any similar provincial tax legislation. Nothing contained in the agreement shall be regarded or construed as creating any relationship (whether by way of employer/employee, agency, joint venture, association or partnership) between the parties other than as an independent contractor as set forth herein. (See Appendix B for Invoice Template)
- The Contractor shall be subject to ADRIA's Complaints Resolution Policy as outlined on ADRIA's website. It is the responsibility of all ADRIA Contractors to take immediate and appropriate action in filing or responding to a complaint.
- The Contractor shall comply with all applicable federal, provincial and municipal laws, rules and regulations arising out of or connected with the performance of the Services under this agreement by the Contractor. The Contractor shall be responsible for all Employment Insurance, Canada Pension Plan contributions, Income Tax and Worker's Compensation payments relating to or performed by the Contractor. Payments relating to any of the above shall be the responsibility of the Contractor and shall be forwarded by the Contractor as appropriate, directly to the government agencies involved.
- The Contractor hereby indemnifies ADRIA in respect of any amount that may become payable by ADRIA as a result of non-compliance by the Contractor with any legislation requiring him to make any remittances on his own behalf, and without limiting the generality of this provision, specifically indemnifies ADRIA in respect to any claims arising through or under Workers' Compensation or Occupational Health and Safety legislation or regulations. Further, the Contractor specifically agrees that in the event that ADRIA becomes liable to make any payment under any statute or regulation as a result of non-compliance by the Contractor, ADRIA may recover any such amount by withholding it from any amount otherwise payable to the Contractor, and as such the set-off or withhold is hereby specifically authorized or the Contractor will reimburse ADRIA.
- The Contractor acknowledges that s/he is being retained as a Contractor to ADRIA and that as such s/he does not have the authority and cannot commit or bind ADRIA to any other matter, contract or negotiation without the prior written authorization of ADRIA.
- ADRIA shall make available such space and facilities as may be required to perform the services described in this agreement at the location specified.
- There are no representatives, warranties, agreements or understandings between the parties hereto other than as expressly contained herein, and this agreement shall contain all the terms and conditions agreed on by the parties hereto.
- A waiver or any breach of a provision hereof shall not be binding upon a party unless the waiver is in writing and the waiver shall not affect such party's rights with respect to any other future breach.

- All notices and communications to the Contractor in connection with this agreement may be addressed to:

  Director of Professional Development
  The ADR Institute of Alberta
  Room CE 223A - Ralph King Athletic Centre
  7128 Ada Boulevard
  Edmonton AB T5B 4E4

- Upon expiration of this agreement no further written or other notices will be required in respect of termination of this agreement. Notwithstanding the foregoing, the Contractor or Director of Professional Development may terminate this contract at any time upon 30 days written notice of their intention to do so. This agreement may be amended in whole or in part from time to time by ADRIA, and any such amendments are to be in writing.

Copyright 2016 ADR Institute of Alberta

POLICIES FOR CONTRACTORS

Professional Conduct & Ethics Policy for Contractors

The ADR Institute of Alberta provides high quality professional training in dispute resolution and believes that all Contractors, while engaged in services with ADRIA, must be supportive and consistent with the goals and objectives of the Training and Professional Development Programs and the National Mediator and Arbitrator Designations. The Director of Professional Development is responsible for the overall management of the Training and Professional Development Programs.

Guidelines

1. Students having concerns regarding Contractors or ADRIA training materials shall refer these directly to the Director of Professional Development.
2. When on contract with ADRIA, a Contractor's first priority is to promote the Society and its Training and Professional Development programs above his or her personal business interests. Soliciting and/or marketing business contracts and distribution of personal business brochures is inappropriate and unacceptable. Directing students to a personal website or business is not acceptable unless specifically asked for by the student. Contractors shall use discretion when handing out business cards to participants.
3. Contractors may not use class lists or email addresses to solicit business or for personal use. Students that ask specifically for Contractor emails or contact information are allowed to provide this information. Confidential information and email addresses remain the property of ADRIA.
4. Contractors shall not discuss their remuneration with course participants.
5. Contractors are expected to be supportive of the structure of the Training and Professional Development Programs. This includes discussion of current course fees and various courses. Note: as courses and programs have changed significantly over the last several years, please ensure you provide correct and current information. If you are unsure about programs and course, please direct students to the Education Administrator.
6. Decisions regarding any changes to course delivery (i.e. date, location, instructor, coaches, number of required participants, number of coaches required) are the responsibility of the Education Administrator. Selection of Contractors is the Education Administrator's responsibility.
7. Contractors who wish to observe core courses or specialized training courses must receive prior attendance approval from the Director of Professional Development.

Copyright Policy

1. Contractors are to comply with the Copyright Act.
2. No materials may be used in any part of the ADRIA Training and Professional Development Program for which copyright approval is required and not requested or obtained.
3. ADRIA is responsible for obtaining permission from copyright holders.
4. Any Contractor who wishes to use copyrighted materials, which are not part of the ADRIA Training and Professional Development Program, must first notify the ADRIA Director of Professional Development and provide all details necessary for the Director of Professional Development to seek approval for use of copyrighted material. No copyrighted materials will be used until the proper approval is obtained.
5. Making single copies of articles for private research or study is permitted and is considered "fair dealing". Making multiple copies without permission is a violation of the Copyright Act.
6. Retyping articles, portions of books or other copyrighted material without consent of the copyright holder is an infringement of copyright.
7. Special permission from the Director of Professional Development is required to use films, videos or recordings in the classroom.
8. In the interests of promoting and educating individuals and groups in the use of ADR, the Society permits use of its publications and other materials protected by copyright on the following terms:
   a) The user may not reproduce any material produced or published by ADRIA without permission from ADRIA, and if permission is granted, the user must appropriately acknowledge ADRIA on the reproduction as the course of the materials;
   b) Approval for the use of ADRIA materials will be made on a individual request basis and subject to compensation being paid to ADRIA;
   c) The Director of Professional Development will approve a schedule relating to the compensation payable for use or reproduction of ADRIA materials;
   d) In special circumstances, the Director of Professional Development may waive payment of compensation by the user.

Copyright 2016 ADR Institute of Alberta

Confidentiality of Material and Information

1. The Contractor acknowledges that certain materials and information made available to the Contractor by ADRIA in the performance of the Services will be of a confidential nature. The Contractor shall not, directly or indirectly, use the confidential information including class lists and e-mail addresses for his/ her own benefit, or disclose to another any confidential information, whether or not acquired, learned, obtained or developed by the Contractor alone or in conjunction with others, except as such disclosure or use may be required in connection with the performance of the Services or as may be consented to in writing to ADRIA.

2. The Confidential Information is and shall remain the sole and exclusive property of ADRIA regardless of whether such information was generated by the Contractor or by others, and the Contractor agrees that upon termination of the Agreement he/she shall deliver promptly to ADRIA all such tangible part of the Confidential Information including records, date, notes, reports, proposals, client lists, correspondence, materials, marketing or sales information, computer programs, equipment, or other documents or property which are in the possession or under the control of the Contractor without retaining copies thereof.

3. Each of the foregoing obligations of the Contractor in this clause shall also apply to any confidential information of customers, joint venture parties, contractors and other entities, of any nature whatsoever, with whom ADRIA, or any associate or affiliate of ADRIA, has business relations.

4. Notwithstanding the foregoing of provisions of this clause, the Contractor shall not be liable for the disclosure or use of any of the Confidential Information to the extent that:

   a) The Confidential Information is or becomes available to the public from a source other than the Contractor and through no fault of the Contractor; or

   b) The Confidential Information is lawfully obtained by the Contractor from a third party or a source outside of this Agreement.

5. The covenants and agreements contained in this clause shall survive the termination of this Agreement. This Agreement may not be assigned by either party in whole or in part without the prior consent of the other party.

6. ADRIA rosters of Contractors are to be used for the purpose of our training only. This roster cannot be distributed or reproduced in any form other than ADRIA business.

7. Individual contact information of Contractors is allowed to be given to students if student requests for private coaching or other opportunities and if the Contractor has provided consent.

ADRIA INSTRUCTIONAL TEAMS

Instructional Team: the instructors, coaches, evaluators and assessors, as well as role players who deliver training for ADRIA, as well as the Education Administrator and Director of Professional Development

Guiding Principles

Adaptive: The Instruction Team will be responsive and adaptive to the needs of adult learners.

Demonstrating Excellence: The members of the Instructional Team will demonstrate excellence in their roles, striving always to deliver the best possible training to learners.

Respect: The members of the Instructional Team will be professional and respectful in their approach to the training, in their interactions with ADRIA staff, with students and with each other.

Integrity: The members of the Instructional Team will bring a high degree of personal integrity to their roles.

Accountability: The members of the Instructional Team will be accountable and responsible for the delivery of course material.

Expectations

All members of the Instructional Team are expected to meet the annual requirements for professional development:

- Attend the annual workshop / training meetings at no charge – when scheduled
- Be a full member in good standing
- As pertinent update ADRIA with any professional development and/or other training
- Remain current on what is happening at ADRIA in regards to upcoming training or events (this information is available on the ADRIA website and in the Newsletter)
- Have an understanding of what is required to complete ADRIA certificate programs and be able to articulate requirements to students
- Be aware of the requirements for applying for designations
- Provide input into course development when asked
- Support other members of the Instructional Team
- Provide feedback on the course once course has been concluded by completing Debrief Forms provided for either the instructor or the coach (Appendix C)
- Be available regularly to be considered an active member of the roster. Members who are not regularly available may be removed

Copyright 2016 ADR Institute of Alberta

Use of Course Materials

- All instructors and coaches shall use course materials in accordance with the Copyright Act and ADRIA Copyright Policy.
- Course materials and videos will be stored at the campuses for instructors' use and may not be removed without the consent of the Education Administrator.
- Instructors are responsible for returning videotapes, DVDs, USBs, and other audio/visual equipment immediately following a private or out-of-town course and will be held responsible for lost or damage.
- Instruction will be consistent with the course materials provided in order to maintain course congruence between instructors and cities. ADRIA encourages instructors to provide examples from their own expertise.
- It is the responsibility of the instructor/coaches to let ADRIA know if there is any incongruence with the existing material or malfunctioning of any of the equipment (computers, screens, video cameras, etc.)
- Additional materials provided by instructor must have prior approval of the Director of Professional Development.

INSTRUCTORS

Procedures for New Instructors

After your application has been accepted, you will be paired with an experienced instructor for at minimum three sessions (example, three 2-3 day sets of course dates) before being scheduled to instruct solo.

This instructor-mentor will provide feedback to the Director of Professional development on your performance. Your file will be reviewed and a determination will be made as to whether ADRIA will engage you as an instructor. (See Appendix D for new instructor Expectations and Performance Review forms)

Once you have been approved to instruct, your name will be added to the instructor roster.

ADRIC Courses

In addition to ADRIA's instructor applications, instructors of the National Introductory Arbitration and National Introductory Mediation courses will need to complete ADRIC's instructor application and submit to ADRIA for preliminary approval. ADRIA will forward successful applications to ADRIC's National Training and Accreditation Committee (NTAC) for final approval.

Note: Applications are only available through the ADRIA office when there are roster openings.

Instructor Responsibilities

- Setting up the classroom, which may include rearranging tables, preparing flipcharts, cueing PowerPoint presentation and videos, designating break out rooms, etc.
- Communicating with all members of the Instructional Team one week prior to the course. This is at the discretion of the instructor based on course requirements.
- If teaching a course involving a panel of experts, it is your responsibility to make sure that the panel is selected and confirmed at least one week prior to the start of class. You must also get approval by the Director of Professional Development on your panel selections.
- Providing coaches with clear instructions and timelines around activities
- Providing coaches/evaluators/role-players with clear expectations and timely feedback (See Appendix C for Course Debrief forms and Appendix D for Performance Review forms)
- Being willing to receive feedback from coaches, staff, and students.
- Upon the request of ADRIA, providing and coordinating supervised opportunities for New Instructors to teach a portion of the course material and to provide feedback on the teaching
- Coordinating with the instructor of the other part of the course (if teaching one part only) to ensure a smooth transition and to pass along important information regarding student progress and subjects covered
- Cleaning the classroom at the end of the last day of teaching, whiteboards, papers, including rearranging tables and chairs so the room looks as it did when you began (for some class space, ADRIA is charged a fee if the room is not set back to the way it was found)
- Assessing student progress including marking exams. **Note:** It is the instructor's responsibility to mark the exams, not the coaches'.

Copyright 2016 ADR Institute of Alberta

- Submitting all final marks in to the ADRIA office within one week of the course conclusion
- Debriefing with the Instructional Team at the conclusion of the course

This final debrief is a formal process that consists of a set list of questions that cover self-performance, team performance, course materials, facilities, learner gaps, and student tracking. This form can be done and submitted within one week of end of course. The instructor will share the outcomes of the team debrief with the Director of Professional Development. (See Appendix C)

- Submitting the following immediately following the completion of the course:
  - Any special requirements for the ADRIC courses as outlined in the course procedures documents. (See Appendix E)
  - An invoice for services provided (see Appendix B)
  - The names of all of your coaches on your invoice
  - The copy of the class list confirming attendance
  - All leftover materials, USB drives, recorders, cameras and classroom materials
  - Student evaluations, quizzes, notes, and final grades
  - All debrief and feedback forms (Appendix C, and Appendix D if applicable)
- ADRIA will provide a survey to all students in the course for feedback purposes. Most surveys will be delivered to students electronically. However, occasionally instructors will be asked to have students complete a paper survey; these should be returned with other course documents. Results will be shared with the instructor. Instructors are not to provide their own class survey.

Note for Calgary instructors: For courses scheduled in Calgary, instructors are asked to courier student course materials (this includes student quizzes, evaluations, and evaluator notes*) to the ADRIA office care of the Education Administrator. The instructor may add the cost of couriering to their instructor invoice, provided a receipt is included. Please return all other course materials to the locked cabinet.

*It is not necessary to send physical copies of the audio and video recordings. The Calgary Education Liaison will be responsible for uploading and sending evaluations (recordings and forms) to the Education Administrator at the end of each course which uses an SER

Instructor Expectations

- As an ADRIA instructor you will support ADRIA as an organization, promoting ADRIA courses and services to the students you work with
- You will be in communication with the ADRIA office staff within the week prior to the course to make sure that you have all of the information you need in order to instruct the course (ie: number of students, number of coaches, materials, updates, USB and any new information that ADRIA would like passed on to students or coaches etc.)
- You will come to class adequately prepared to instruct, having read over the instructor guidelines and material to be covered
- You will arrive at least 30 minutes before the start of the class to set-up the classroom and deal with logistics (ie: ensuring that the PowerPoint presentation works before students arrive, checking to verify that you have all of the correct printed material needed)
- You will keep the Director of Professional Development OR Education Administrator informed about any situations which may arise in class
- You will use course materials in accordance with the guidelines on Page 14)
- If a Lead Coach is assigned, you will touch base prior to class starting as to what your expectations are and the level of involvement needed. (checking on break out rooms, coffee/tea, monitoring breaks and timing, etc)

Copyright 2016 ADR Institute of Alberta

COACHES

Procedures for New Coaches

After your application has been accepted, you will be expected to attend a New Coach Orientation Session before starting to coach.

Coaches will have the first three coach days, without payment as part of the new coach training. You will work with the instructor or experienced coaches who will solicit feedback on your performance. Upon completion of the three days, your file will be reviewed and a determination will be made as to whether coaching is a fit for you. Instructors are able to make a recommendation for additional mentoring if more practice is needed. (See Appendix D for new coach Expectations and Performance Review forms)

Once you have been approved to coach, your name will be added to the coaching roster and you will be able to invoice for your coaching services. (See Appendix B)

ADRIC Courses

In addition to ADRIA's coach applications, coaches for the National Introductory Mediation course will need to complete ADRIC's coach application form and submit to ADRIA. ADRIA will forward applications to ADRIC's National Training and Accreditation Committee (NTAC) for final approval.

Note: Applications are only available through the ADRIA office when there are roster openings.

Coach Responsibilities

- Assisting instructors by supervising student role-plays and skill-drills
- Being attentive in class to be able to provide perspectives when asked by the instructor
- Being a model for students and providing them with a safe learning environment
- Supporting the instructor in the delivery of the course material and activities
- Clarifying any inconsistencies or concerns with material to the instructor
- Notifying the instructor should students raise inconsistencies in what they've heard from different coaches or instructors. (Assure students that different instructors/coaches will focus on different areas and that much of negotiation and mediation is an art, not a prescribed, formulaic science).
- Being willing to receive feedback from the instructor, students, fellow coaches, and staff.
- Providing instructors with timely feedback regarding student progress
- Debriefing with the Instructional Team at the conclusion of the course.
- This final debrief is a formal process that consists of a set list of questions that cover self-performance, team performance, course materials, facilities, learner gaps, and student tracking. (See Appendix C)

Coach Expectations

- As an ADRIA coach you will support ADRIA as an organization, promoting ADRIA courses and services to the students you work with
- You must provide your availability to ADRIA, using the method set by ADRIA, and must give immediate notice to ADRIA if that availability changes
- You will arrive 20-30 minutes before the class begins to meet with the instructor, the time can be confirmed with the instructor prior to class beginning.
- You will come to the course adequately prepared, having reviewed the course material
- You will be focused and present while in the class
- You will resist teaching new material to students while in a small group, keeping in line with the stage of learning that the students are at
- You will not discredit or openly disagree with the methodology and techniques being taught by the instructor or course material (if you have any concerns about course content, this can be discussed during the team debrief or privately with the Director of Professional Development)

Copyright 2016 ADR Institute of Alberta

Checklist for Coaching a Breakout Group

- Brief introductions, if needed.
- **Creation of safe space** for learning. This is easier said than done. It is important that each student feels safe to experiment and make mistakes in the breakout group. This requires trust in you and the other students. Depending on the course you are coaching in, you may need to raise the issue of confidentiality among the students. Discuss their needs, if any, for confidentiality and get clear agreement before proceeding. Also discuss any other needs they may have with respect to their participation.
- **Organizational business** – who goes first, second, etc. Also make clear how long the role-play and debrief will be for each person.
- **Time management** – It can be most challenging to manage the allotted time so that each student gets equal role-play/debrief time AND so that the session ends on time. If you anticipate that the session time will be difficult to manage, invite the students' assistance in making sure that each participant gets equal time, and that you finish on time.
- Discuss with the skilled person how s/he sees you being most beneficial with respect to providing **feedback** and/or direction. On what basis, if any, would s/he want in-the-moment interventions from you? Given that you will be providing feedback on all major aspects of the student's work, how does s/he want to receive your feedback? Is there anything in particular that they are working on that they would like specific feedback on?
- Make sure there is **clarity on the role-player's part** about the nature of their task. S/he may need to hear from you about how positional/angry/easy to be in the role. Let role-player know you may ask them to "ramp it up" or "tone it down" using hand signals (thumbs up to be more positional or thumbs down to ease off) Invite the role-player to stay in character for the duration of the role-play.
- Be clear about your **expectations of observers** – what specific kind of feedback you will be asking them to offer. Students are often unclear about how to be an effective observer, so the students may benefit from your clarity about this (body language, specific active listening skills, types of questions being asked, DESC, etc).
- **After the role-play**, it is a good idea to invite the skilled person to 1) take a minute and silently reflect on the role-play and his/her work before starting his/her self-evaluation 2) Ask the skilled person to focus first on the things that s/he believes went well before getting to the areas of difficulty 3) Move next to the role-player's experience of the skilled person's work (what was effective, what got in the way, etc.), 4) hear briefly from the observers, and 5) finish off with your own observations. (for more information on providing feedback, please refer to **Providing Feedback** on Page 28)
- The skilled person's role-play and **debrief time** belongs to that person. His/her time should not be taken up by questions and comments from others that are not specifically about the skilled person's exhibit.

- Remember the **importance of modeling exemplary, congruent behavior** as a coach. The students are looking to see how you handle all aspects of the session. How you embody (or don't) the values of the interest-based approach in your coaching work sends a message to them about your own level of buy-in to this approach, and will have consequences beyond your breakout session.
- Encourage your groups to **find value in all coaching/instructor styles**, the many styles will enhance the students learning
- If any concerns or comments arise during your group discussions, ask permission from student to **seek clarity from instructor/staff** on how best to move forward for their situation, this will model and support what we are teaching and provide transparency for the group
- **Provide clear, concise, relevant feedback** for exercises. Too much positive or negative feedback can have students become overloaded or overwhelmed or even over confident
- **The depth of feedback** provided is dependent on the level of course being taken. Give appropriate feedback for beginner vs. advanced courses vs. condensed private contracts
- **Be attentive** to the students' needs without being intrusive or intimidating.
- **Thank the students** at the conclusion of the session for their hard work and risk-taking.

Copyright 2016 ADR Institute of Alberta

Online Practice Session Coaches

Online coaches will be expected to participate in one orientation session online to ensure that the coach is comfortable with the technology and process for online coaching. Your first online coaching session will be without payment as part of the new coach training. You will work with an instructor or experienced coach who will review and solicit feedback on your comments and instructions to online students. Alternatively, the Director of Professional Development may choose to review the recorded practice session to determine your suitability for online coaching. If more practice is needed, a second trial session may be scheduled. Once you have been approved to coach, your name will be added to the coaching roster and you will be able to bill for your coaching services. (See Appendix B for Invoice and Appendix D for Expectations and Performance Review forms).

Keeping in mind the **Coach Responsibilities and Expectations**, outlined on Page 19, the following sections outline the specific Responsibilities and Expectations of Online Coaches as they differ from traditional forms of coaching, based on the medium of online sessions.

Online Coach Responsibilities

- Attending training for the online Mediation Skills Practice Sessions platform.
- Administering online Mediation Skills Practice Sessions
- Login to the session at least 5 minutes prior to the start time to set up and troubleshoot any audio/video problems
- Understanding the participants' backgrounds and objectives prior to starting the sessions
- Discussing with the learner-mediator what level of feedback they want from you
- Prompting role-players in order to elicit appropriate levels of compliance or resistance
- Providing feedback and coaching to the learner-mediator according to learner-mediator's background and goals
- Recording the meeting as soon as you log on, saving the video to a desired location at the end of the session. The video must then be emailed along with your invoice for the session to education@adralberta.com. Deleting video after delivery from your computer.

Online Coach Expectations

- As an ADRIA coach you will support ADRIA as an organization, promoting ADRIA courses and services to the students you work with
- You must provide your availability to ADRIA, using the method set by ADRIA, and must give immediate notice to ADRIA if that availability changes
- You will come to the session adequately prepared, having reviewed the role-play material
- You will be focused and present while in session
- You will not discredit or openly disagree with the methodology and techniques being taught by ADRIA instructors or course materials (if you have any concerns about course content, this can be discussed during the team debrief or privately with the Director of Professional Development)

EVALUATORS – ARBITRATION STREAM

Evaluators may be hired for student awards submitted 30 days after the final day of a course or to review an unsuccessful award. An evaluator may also be hired after a student has been unsuccessful on their written award and has 1) appealed, or 2) written a second award. (See Appendix E for evaluation procedures). All unsuccessful awards are reviewed by two approved arbitration evaluators prior to a student being deemed unsuccessful in the National Introductory Arbitration course.

Evaluator Responsibilities

- Reviewing sample awards and grades to calibrate marking for program consistency.
- Providing the students with sufficiently detailed written feedback, including what they lost marks on and how they can improve (making sure it is clear and legible – please use digital forms provided to type feedback)
- Please be sure that any automatic fail is clearly marked and explained for the student.
- Submitting all feedback and grades within 45 days after the student submission deadline.
- Reviewing the student award with an unsuccessful student, at ADRIA's request, giving them a better understanding of what was expected of them and how they can meet those expectations in the future

Copyright 2016 ADR Institute of Alberta

EVALUATORS – MEDIATION STREAM

Evaluators may be hired for student evaluations on the final day of courses, to evaluate audio or video recordings, or for re-evaluations after a student has been unsuccessful in a course evaluation. Evaluations should not be confused with assessments or supervised mock mediations. (See **Assessors and Supervisors** in the next section for information on C.Med Assessments or Supervised Mock Mediations for Q.Med designation; See Appendix E for course procedures)

Evaluator Responsibilities

- Reading the course material and evaluation criteria prior to evaluating
- Providing instructors with timely feedback
- Supporting the instructor and other evaluators/coaches
- Attending an evaluation calibration session organized by the Director of Professional Development
- Providing the instructor with a comprehensive, written evaluation of students from Day 6 evaluations by the end of Day 6 (for in-class evaluations). Or providing the Evaluation Observation Form for the National Introductory Mediation course.
- Providing the students with sufficiently detailed written feedback, including what they lost marks on and how they can improve (making sure it is clear and legible)
- Providing students with private limited verbal feedback after self-evaluation has been completed. Use your discretion regarding the level and depth of the feedback give, an example is: 2 or 3 things done well, 1 or 2 items specifically that need improvement). Again this is dependent on the level of the course being taken.
- Evaluator Feedback should be given privately (without other students in the room) so as not to give an advantage to those waiting to be evaluated.
- The evaluator should not give any indication to the student whether they have passed or failed
- The role players are not asked to provide feedback during the evaluation, and at most they can provide 2 positives comments (stars) and one reminder (wish)
- If conditional pass is being considered, talk to the instructor as to the criteria and expectations that will need to be met to become successful. The instructor will need to consult with the Director of Professional Development before a conditional pass is granted. A detailed list of expectations in order for the students to be successful needs to be provided.
- Ensuring student evaluations are properly recorded
- Reviewing the evaluation video or audio with an unsuccessful student at their request, giving them a better understanding of what was expected of them and how they can meet those expectations in the future

ASSESSORS AND SUPERVISORS

Chartered Mediator Assessments

Qualifications:

- Hold a Chartered Mediator Designation in good standing
- Possess an in depth knowledge of mediation training and standards
- Experience with conducting evaluations/assessments
- Approval from the Designation Committee

Responsibilities:

- Maintaining your Chartered Mediation designation in good standing
- Attending an assessment calibration session organized by the Director of Professional Development
- Reading assessment criteria prior to the assessment
- Keeping the assessment organized and providing guidance to the role-players
- Debriefing with the role-players at the conclusion of the assessment
- Giving limited, private feedback to the student after self-evaluation is completed (what went well 2 or 3 specific items, 1 or 2 things that need to be worked on)
- The assessor should not give any indication to the student whether or not they have been successful.
- Ensuring the Assessment is video recorded
- Providing the ADRIA office with a comprehensive, written assessment of the learner
- Submitting all recordings, forms, and documents to ADRIA's Education Department within 48 hours of Assessment
- Returning all video recording equipment and materials provided by ADRIA to either the Education Department (Edmonton) or the Alberta Security College locker (Calgary) within 48 hours.

Copyright 2016 ADR Institute of Alberta

Supervised Mock Mediations for Qualified Mediator

Qualifications:

- Hold a Chartered Mediator Designation in good standing
- Possess an in depth knowledge of mediation training and standards
- Experience with conducting evaluations/assessments
- Be an ADRIA instructor or coach
- Other Chartered Mediators who wish to join the Q.Med Supervised Mock Mediation Supervisor Roster should be able to demonstrate experience in mediation evaluations. Prospective supervisors are asked to submit a recorded (video or audio) evaluation along with the evaluation and evaluator notes to ADRIA's Education Department in order to ensure consistency of evaluations.

Responsibilities:

- Maintaining your Chartered Mediation designation in good standing
- Attending a calibration session organized by the Director of Professional Development
- Reading Supervised Mock Mediation (SMM) criteria prior to the mock mediation
- Keeping the mock mediation organized and providing guidance to the role-players
- Debriefing with the role-players at the conclusion of the mock mediation
- Giving private feedback to the student after self-evaluation is completed (what went well 2 or 3 specific items, 1 or 2 things that need to be worked on)
- Providing the ADRIA office with a comprehensive, written assessment of the learner
- Submitting all recordings, forms, and documents to ADRIA's Education Department within 48 hours of Supervised Mock Mediation. Note: Video recordings are not required for SMMs
- Returning all video recording equipment and materials provided by ADRIA to either the Education Department (Edmonton) or the Alberta Security College locker (Calgary) within 48 hours.

ROLE-PLAYERS

Qualifications:

- Role-players may be classmates or peers of the candidate for the following situations (provided they have sufficient experience in similar role-play situations that they will not hinder the candidate in demonstrating their skills):
  - Practice groups
  - Course evaluations
  - Re-evaluations
  - Supervised Mock Mediations
- Chartered Mediator Assessments require the following:
  - A minimum of one Chartered Mediator as role-player
  - The second role-player may hold a Qualified Mediator designation provided that they have successfully completed the Chartered Mediator Assessment.
  - C.Med Assessment Role-Players require approval from the Director of Professional Development

Responsibilities:

- Coming with your role read and fully prepared
- Supporting the evaluator or assessor and providing feedback when requested
- Debriefing with the Instructional Team at the conclusion of the course (if necessary)
- Role-players arranged by ADRIA are to invoice ADRIA for the cost of each role-play. Role-players arranged privately (either through the student or candidate) are not to invoice ADRIA.

Expectations

- See Appendix F for Role-Players' Responsibilities and Role-Players' Pledge

Copyright 2016 ADR Institute of Alberta

PROVIDING FEEDBACK

Providing thorough, accurate feedback after role-plays is pure art and not at all science. While we know what skills and values are most effective in helping work through conflict situations in the principled interest-based approach, we are continually faced with the contextual nature of breakout groups themselves. Each group consists of different people at different stages of integrating the course material, some group members have some history together, each student will have a distinct response to you and your feedback, and each student will experience a range of emotions and openness over the duration of the course.

Amidst this entire context, our job is always the same: to be effective in our coaching work and to model the values and skills of which we are stressing the importance. What follows are some suggestions about how our feedback can be most effective, both in terms of content and delivery.

- ADRIA recommends that Same/More/Less Model for giving feedback. The coach should be able to communicate to the student or candidate: what he or she should continue to do that works well (same); what he or she should do more of in order to improve (more); and what he or she should do less of in order to improve their performance (less). The instructor should be able to give 1-3 examples for each of the Same/Less/More statements.
  Remember, be clear and concise. Too much positive or negative feedback can be overwhelming.
- Be specific! For example, rather than give general feedback about a student's reframing as being "good", provide as many word-for-word examples as you can, this can be done by taking note of specific skills you hear during skilled persons role-play and talk about what it is specifically that makes those reframes "good".
- Comment on observable behavior. Avoid making inferences about the student's possible psychological motives. Rather, it can foster healthy reflective practice to invite students to work out for themselves what was going on for them psychologically.
- Be honest! Coaches do no one any favors by sugarcoating feedback, or by minimizing the importance of the things the student needs to work on. On the contrary, being 'too kind' risks the likelihood of misleading the student about what work is necessary to achieve a meaningful level of competence. This is a safe learning environment, the feedback given is extremely important for future learning.

- Be respectful! We must recognize the dignity and worth of each student who we interact with, and recognize that each person is doing the best s/he can, given his/her state of mind, openness of heart, and level of awareness. While we are busy being honest with each student, we should not lose sight of the equal need to show respect. We need to be sensitive to how difficult it can be to hear some feedback messages. Remember; be hard on the problem, yet gentle and respectful on the person.

Example: "One of the components of the principled, interest-based approach is transparency. When I hear you say in your self-assessment that you weren't sure (in the role-play) which issue you were discussing but you didn't want to risk saying so, I'm thinking that it might have brought greater clarity to your discussions AND further developed trust if you had chosen to say that you were needing to focus on one issue at a time."

When students receive feedback about their skill usage and not about the principles those skills serve to enact, the student can come to believe that effective conflict management is only about the "right" use of the "right" skills. This mistaken belief makes the integration of the principled approach much more difficult.

- Be aware of the course level you are coaching, and avoid holding students to an unrealistically high standard, feedback needs to be given at the level the student is at. While we need to actively encourage the students' striving for excellence and mastery, holding them to a standard that exceeds their reach can create in the students an unnecessarily negative sense of their development.
- When you can, link your feedback to the student's feedback. It is important that students get some response to their self-assessment. Re-enforcing their awareness with your agreement can enhance their trust in their analysis.

Example: "You said earlier that you were happy with your Goal Statement. I would agree. What I thought was particularly effective was the way you talked about each interest and brought each interest to life, rather than simply rattle through a list of disconnected words."

Conversely, your contradicting their self-assessment can help put them back on track.

Example: "You mentioned in your self-assessment that you were particularly happy with your questioning in Stage Three. When I look at my notes, I counted seventeen closed questions and six open questions, and there were only four instances where you did something with the answer (a reframe, summary, etc.) before asking another question. You heard the role-player mention that she felt interrogated by you, and that she didn't feel understood. The spirit behind asking questions is about being openly curious and invitational and not having a predetermined answer in mind, and you are aware of the importance of proving your understanding on an ongoing basis. What I need you to hear is that your questioning in Stage Three deserves your attention."

Copyright 2016 ADR Institute of Alberta

- Support the instructor! Each instructor has a unique style and emphasis in course delivery, and it is important to support the instructor's approach in your coaching work. Referring in your feedback to points made by the instructor is one way of affirming that the instructor and coaches are an instructional team. If you find yourself coaching for an instructor whose message does not fit for you or needs clarity there are numerous choices you can make to deal effectively with that situation. 1) Talk to instructor privately about a concern 2) Ask instructor to clarify a thought or misunderstanding 3)Talk to Director of Professional Development 4) Ask the student raising the question to bring his or her concerns to the instructor or Director of Professional Development. Remember, you are coaching for ADRIA. That means that your feedback ought to support the training priorities and perspectives of the ADRIA course material. It can be easy to fall into the trap of coaching students to be more like you, rather than coaching them to integrate the concepts and skills taught by ADRIA.
- Skills to coach for
  - Integrity of the process
  - Questions focused on substantive (content) and relationship (process) interests
  - Make sure all categories of questions are addressed
  - Parties shift
  - Range of skills
  - Working together in a balanced way

Coaching For Excellence: USA Models

Permission to use the following document was given to ADRIA for the purposes of training by the Association for Conflict Resolution.

Conflict Pros Coaching Model

This model was developed by Joan F. Tobin, M.S.W. and Mark Goldman, M.A., both partners in Conflict Pros, Mesa, Arizona. Permission has been given to print the following.

The following points are notes taken by ADRIA staff from the presentation Coaching for Competence and Credentialing at the ACR Conference in San Diego, California:

- As instructors, we have a responsibility to students to evaluate competence. Competency is making conscious decisions.
- As a coach, you need to be able to deal with strong emotions, help slow down the learning process (helps move to a conscious level), and to help the student mediator expand their choices.
- The coach and student need to have a discussion about what to look for.
- Explain to the student that a role-play is like a flight simulator: you can crash, burn, and try again.
- Fish bowls often provide safety for students to move in and out. Expand your questions at a group level.
- Advanced coaching level: the student should be able to stop at any point and identify what he/she did as a mediator while the beginner mediator is trying to track a process (not getting lost).
- The goal is not only for the parties to make conscious decisions, but also for the coach to make conscious decisions.
- If the student says they are “stuck”, don’t go into a problem-solving approach.
- As a coach check for student neutrality.
- Good coaching means to be aware of your own reactions both emotional and physical.

Copyright 2016 ADR Institute of Alberta

DEGREES OF COMPETENCE: ADRIA GUIDELINES

NOT COMPETENT	COMPETENT	COMPETENT Plus
Manages Conflict		
One dominates Ignores emotionally damaging statements. Lacks basic skills Neither party feels safe Lacks confidence in ability	Develop atmosphere of cooperation. Reframes to defuse Intervenes to clarify and confront discrepancies Emotionally safe atmosphere. Comfort with conflict Attend to non-verbals	In addition to COMPETENT skills: Sets collaborative and respectful tone of negotiations Normalizes conflict Redirect emotional energy from personal alienation to joint resolving Shows confidence in ability
Adapts Process		
Clients feel unsafe No control over process No guidelines No common management Jumps to problem solving Lacks basic skills Lost in process Moves to mediator's issue	Seeks direction from parts in process design Adapts ground rules Reframes to gain consensus and defuse emotion Moves parts through process Seeks commitment to guidelines Attends to non-verbals	In addition to COMPETENT skills: Works with parties to manage process Doesn't resort to premature problem solving
Professional Standards/Ethics		
Unaware of readiness to process Continues when inappropriate Own agenda and ground rules Unable to adapt to parties Lacks basic skills Violates Code of Ethics and Professional Standards	Decision making power with parties Evaluates need to refer	In addition to COMPETENT skills: Processes with integrity, respect, guarding rights and self-determination
Managing Information		
Develops framework to track information Does not keep track of information Does not summarize info accurately Does nothing substantive in hour Misses confidentiality/ authority to settle Lacks basic skills Misuses/mismanages information	Helps them organize information Sees improvement of information Presents information in neutral terms Helps parties identify principles to guide decision-making Understands facts Defines roles of mediator Defines process Helps generate agenda Prioritizes agenda items Summarizes information	In addition to COMPETENT skills: Does not establish workable agenda Prioritizes agenda Helps them see information links and new information

NOT COMPETENT	COMPETENT	COMPETENT Plus
Interest-Based Solution		
Provides legal advice Does not summarize Limits creation of options Frames issues as positional Focus on positional bargaining	Breaks solution into managed portions or interim solutions Interim measures to assists till next session Reality test solution Preserves self-determination when impasses reached	In addition to COMPETENT skills: Interest-based criteria to judge Options which best address interests Own principles evaluates solution
General		
Own ideas of process Own agenda, directive approach Coerces parties to come to an agreement	Range of skills Objective/Subjective Emotion Facts/Interpretations Feelings Substantive/Relationally Balance	In addition to COMPETENT skills: Integrity of process Working together in balanced way Shift
Relationships With Parties		
Establishes minimal relationship with parties Expresses own views, own decisions Inappropriate ending Leads with own agenda Reacts emotionally Lacks basic skills, knowledge and ability Treats parties in disrespectful manner Chooses sides	Affirms parties' right to self-determination Challenges respectfully Supports parties' integrity Acknowledges what they express as important to them Consistently builds rapport Builds confidence in process and self Acknowledges feelings	In addition to COMPETENT skills: Mutually respectful Trusting Parties able to take risks
Collaborative Relationships Between Parties		
Ineffective guidelines for communication Ignores/mishandles statement of feelings Allows imbalance No mutual definition of problem Some information not disclosed Maintains distrust and lack of communication Lacks skills, ability and basic knowledge	Promotes mutual understanding empathy for each other Respects parties' uniqueness Promotes parties' defining own outcomes Assists establishing communication guidelines Engages both in discussion Promotes each other's understanding of conflict Defines mutual definition of problem	In addition to COMPETENT skills: Enhances collaborative working relationships Facilitates new communication patterns Encourages mutual regard for each other's interests
Interest Exploration		
Allows inappropriate focus on past Ignores feelings Allows assumption and misunderstanding Accepts statement at face value -no probes Misses important interests Lacks skills Does not know difference between position and interest Discloses no interests	Restates interests in impartial, logical way Normalizes feelings Keeps them present and future focused Identifies common ground Allows sufficient time to express interests Tracks body language Questions that lead to discovering interests Clarifies misunderstanding and assumptions.	In addition to COMPETENT skills: Uses parties' interest to move them forward

Copyright 2016 ADR Institute of Alberta

CONTRACTOR RATES, EXPENSES, AND INVOICING

The following rates are for ADRIA classes and exclude Specialized Training Courses. Please see the Specialized Course Training Section for invoicing information. Rates effective July 1, 2016.

Rate	Service
$75	Coaching One Online Practice Session (1.5 Hours)
$75 $100	One Role-Play (as role-player) – for course evaluations, and Supervised Mock Mediations One Role-Play (as role-player) – for C.Med Assessments
$100 $100	One Evaluation – Communications in ADR One Evaluation + audio review – National Introductory Mediation
$100 $50	Marking Arbitration Awards/award Marking Practice Arbitration Awards/Award
$250	Coaching/ One Day
$700	Instructing/ One Day

1. The Contractor will be paid the fee as stated plus Goods and Services Tax, if applicable, for each day of instruction. A day is defined as eight hours and includes one hour for lunch. The Contractor shall submit their GST registration # on their invoices if applicable. Parking will be reimbursed for instructors and coaches (receipts must be attached to invoice).

2. Contractors who accept contracts outside of their home cities accept contracts as a "local contractor" unless pre-negotiated with ADRIA. Hotel, travel, and per diem will not be covered. Contractors with pre-approval with ADRIA will be reimbursed for expenses incurred for out of town instruction. This will include accommodation (to a maximum of $150.00 per day, inclusive of taxes), and travel expenses to be approved by the Director of Professional Development (or as stated on the ADRIA invoice). Contractors will also be paid a per diem rate (up to a maximum amount) for each meal for each instructional day while out of town.

Guidelines for Submitting Invoices

Master invoice

For consistency, please only use the ADRIA master invoice (See Appendix B) when submitting a claim. If you would like an electronic version of a master invoice, please email education@adralberta.com.

Submitting Invoices

Invoices should be submitted in the same month of the last day that you coached. The exception will be courses that are held over a period of several months. In that case, you can submit an invoice for training taught in THAT month.

Payment

ADRIA usually pays two weeks after invoices are received. This however may not apply to private training opportunities. Please contact ADRIA for information on your specific circumstances.

Please provide:

- Your name and current address
- Your business name & GST # (if you have one)
- Course name, instructor name, and course date
- Whether instructing, coaching, evaluating, or role-playing
- Any expenses incurred – parking, travel , food, accommodations

*Please note that it is your responsibility to notify ADRIA of any changes in your personal information.

Invoice Number

Please generate your own statement number (located upper right corner of invoice.)

Invoicing for ADRIC's National Introductory Mediation course

As of June 2016, ADRIA will change how evaluations are conducted on Day 6 of the National Introductory Mediation course. Coaches and Instructors will not be required to complete evaluations on this day. Evaluations will be recorded and evaluated by the evaluation team. It is the coaches' responsibility to ensure student evaluations are properly recorded.

Please invoice for Day 6 of the National Introductory Mediation course as a regular coaching day (see chart above for rates).

Receipts

Receipts over $5.00 must be submitted with the invoice.

Copyright 2016 ADR Institute of Alberta

Parking

You will be reimbursed in full with the original receipt. Please include parking ON THE SAME INVOICE.

Listing coaches on the invoice

Coaches: instructors are NOT responsible to submit coach invoices or to provide extra blank copies.

Instructors: please list all coaches in the box provided at the bottom of the invoice, and include the days they coached or evaluated

Membership

All coaches and instructors must be full ADRIA members, and have a SIGNED AGREEMENT OR CONTRACT to instruct or coach.

Common errors in submitting invoices

Faxing or emailing a duplicate invoice

Invoices are usually paid within two weeks; however please allow extra time for delivery. If you believe your invoice has been missed (min. of 30 days) and would like to know the status of your invoice, please contact the Director of Professional Development directly to avoid duplication.

Not using ADRIA's Invoice

For consistency, please submit using an ADRIA invoice.

Sending a separate invoice for parking

All expenses for any given course should be included on ONE INVOICE.

Missing Information

For cross-referencing, please be sure to include the instructor, course dates, and coaches /days coached.

Incorrect rates

You may have noticed from time to time that there are slight difference in the amount paid to you and the amount submitted on your invoice. This is often because incorrect rates such as, coach /instructor day rate or parking, etc. have been submitted or GST was not calculated correctly. Please refer to the correct rates on the invoice master before submitting an invoice.

Insurance

Instructors and coaches for ADRIA do not need private insurance for teaching, they are covered by ADRIA.

SPECIALIZED TRAINING COURSES

Course Criteria

If you have a course that you would like to deliver through ADRIA, please fill out the submission form (Appendix G) and return to the ADRIA office for review. All specialty courses must meet the following criteria to be considered as an offering to the ADRIA membership.

- The instructor must be the course designer or have a license to teach the course.
- Instructor owned content is only offered by the developing instructor, any changes to this must be approved by the Director of Professional Development
- The specialized training course must be designed such as that those who complete the course can use the course towards the Certificate in Conflict Leadership or required hours of training towards obtaining the Q.Med and C.Med (or Q.Arb and C.Arb) designations.
- The course must include 7 hours of training per day excluding breaks.
- The course must reflect current and prevailing trends in the ADR field, or be of interest to the ADR community.
- The course must be consistent with current legislation, if applicable.
- The course must not be redundant with presently established courses.
- The course must be in keeping with the ADRIA mission and educational goals.
- The course must be fully and accurately described in any and all promotional material and course outlines.
- The course must clearly delineate competencies.
- Specialized Training instructors must meet all previously outlined instructional guidelines. (exceptions can be discussed with the Director of Professional Development)

Student feedback will be solicited after each course delivery, with specific questions focused on the instructor's delivery and the course material. Once ADRIA has received student feedback, courses will be reviewed after each offering based on the above criteria.

Copyright 2016 ADR Institute of Alberta

Specialized Training Guidelines

- Instructors will retain copyright and will be acknowledged for course materials developed.
- The minimum enrollment needed to run the course will be 6 students. The maximum enrollment will be 20 students. In agreeing to deliver your course through ADRIA, you are agreeing to teach the course if the minimum number of students is met. (A lower minimum or maximum may be agreed upon with the Director of Professional Development during the submission process).
- ADRIA will provide classroom facilities as well as administrative services such as registration intake and payments.
- The specialty course will be accepted as an elective in the Certificate in Conflict Leadership Program.
- ADRIA will provide a survey to all students in the course for feedback purposes. Most surveys will be delivered to students electronically. Occasionally instructors will be asked to have students complete a paper survey; these should be returned with other course documents. Results will be shared with the instructor. Instructors are not to provide their own class survey.

Specialized Training Instructor Expectations

- The instructor is a full member in good standing.
- The instructor will provide the ADRIA office with fully updated, edited and appropriately formatted electronic master copies of all course materials at least three weeks prior to the start of the class. ADRIA will be responsible for the printing of the material to a maximum budget of $25/student. Any material exceeding this budget will be the financial responsibility of the instructor. This material must be congruent with the ADRIA branded format, with the ADRIA logo on the cover page.
- Significant revisions or suggested updates to all materials must be approved by ADRIA no later than four weeks prior to the delivery of the course.
- The instructor and ADRIA share joint responsibility for promoting the course. It is expected that the instructor will also promote the course through their network.
- Instructors will be expected to hand-out a letter of completion at the end of the course. The template for this letter will be provided by the ADRIA office and must include the ADRIA logo, course name and total hours of the course. The instructor is responsible to ensure hours are completed by each student.

Rates

1. All ADRIA approved specialized training courses will be offered to the ADRIA membership for $300/person/day (exceptions can be discussed with the Director of Professional Development).
2. Rates for the course designer/instructor are per day of instruction as follows:
   a) $1000 for first 6 students
   b) $175 per students 7-12
   c) $200 per students 13-20
3. The cost of printing to a maximum of $25/student is included in ADRIA's budget for the course.
4. It is the financial and administrative responsibility of the instructor to contract any and all coaches, co-instructors or panel members they may need for the delivery of the course.
5. Travel expenses such as accommodations, gas and meals are the responsibility of the instructor alone unless otherwise agreed upon with the Director of Professional Development, prior to the beginning of the course.

Copyright 2016 ADR Institute of Alberta

TRAINING FACILITIES

All locations are equipped with a computer, projector and flipcharts for your use. If instructing, please show up to class 30 minutes before the start time to ensure that everything is organized.

Edmonton

Training Location:

Room CE 203 – Ralph King Athletic Centre,
Concordia University, 7128 Ada Blvd
(our building is on the corner of 112 Ave and 73 St)

Class times: 8:30am - 4:30pm daily (rooms will be open at 8am)

Parking: located in front of the building for a fee of approx. $7.00/day. This will be reimbursed to you with receipts during invoicing.

Food/Beverages: free coffee and tea is provided for the class. There is a cafeteria in the main Concordia building that is a short walk away, there are a few fast-food restaurants located not far (5 min. drive) such as a Subway and McDonald's, as well as a Save-on-Foods. We also have a microwave and fridge in the ADRIA offices which you may use if you wish to bring a lunch.

Nearby Hotels: we recommend La Boheme Bed & Breakfast (www.laboheme.ca). It is located within walking distance of our facilities and is next to two restaurants and a café and you will get a special rate if you mention you are with Concordia.

Calgary

Training Location:

Alberta Security College
1107 – 53 Ave NE
Calgary, Alberta,
T2E 6X9

Class times: 9:00 a.m. to 5:00 p.m. daily

Directions:

Enter at the Alberta Security College on the west side of the Commissionaire's building. (South of Deer Foot Mall; across from the mail sorting plant and the African Eatery). Upon arrival at the college students/instructors will be issued a pass and will keep it with them until the end of class. Please check with reception for the classroom assigned.

Parking: There is free parking in the parking lot – if the lot is full, there is also street parking available.

Coffee: There will be a coffee machine and creamer/sugar on site. Students are asked to bring travel mugs as the location only provides disposable polystyrene cups.

Instructors have a budget of $10/day for additional refreshments such as real coffee cream, muffins, or other healthy snacks. Receipts must be submitted with invoice.

Lunch: There is a fridge, microwave, and vending machine with bottled water & snacks on site. For lunch the Italian Store beside Scarpone's has a lunch counter, there is also a Tim Horton's, Starbucks, Ricky's, and Wendy's all within walking distance plus lots of others just down the road.

It's okay to eat in the classroom, but please be sure to remind the students keep the classroom clean and tidy.

Classrooms and Materials: There is a computer, projector & speakers in each classroom. The computers have PowerPoint, internet access, and are able to play DVDs. You will need to bring the PPT on a USB. There is also an IT department on site if you run into difficulties.

There are white boards & dry erase markers in all the rooms and flip chart & markers are available.

ADRIA has a locked filing cabinet on site. Reception has the key and you will need to sign the key out to get access

Copyright 2016 ADR Institute of Alberta

Items to be stored in Calgary locker:

- Tent cards
- Flip chart paper & markers
- Green tape (to tape flip chart paper to walls)
- Course material (manuals)
- DVD's for Arbitration
- Cameras, recorders, batteries

Course manuals will be shipped to the Alberta Security College and will be stored in the ADRIA locker.

If instructors have any issue or problem, ask for Jonaline (Jona) Celso or Gena Boyce.

PROFESSIONAL DEVELOPMENT BENEFITS

Instructors and Coaches

ADRIA Owned Courses

(Communications in ADR, Conflict Management for HR Professionals, Separation and Divorce Mediation: Modules 1-3, Consensus Decision Making, ADR Business)

- 25% discount

ADRIC Courses

(National Introductory Mediation, National Introductory Arbitration)

- 10 % discount

Specialty Courses

(Mediation Case Development, Oil & Gas, Restorative Practices, LAB, etc.).

- No discount – these courses are owned by the instructor and the arrangement with the instructor does make it viable for us to offer a discount. Instructors are able to offer auditing spaces at their discretion – payment to cover the cost of materials would still be required.

Professional Development Events

Discounts may be offered for registration at ADRIA's Conference and at other Professional Development or Learning Events. Discounts will vary based on the event. An email will be sent to coaches and instructors informing them of the discount for any events that qualify. Coaches and instructors would still need to meet the conditions outlined to receive the discount.

Conditions

Coaches will need to have coached a minimum of 6 full coaching days in the past 12 months to qualify for a discount. Instructors will need to have taught a minimum of 6 full days in the past 18 months.

Discounts are limited to a maximum of 6 days of courses in a 12 month period.

Copyright 2016 ADR Institute of Alberta

LIST OF APPENDICES

Appendix A. Contract

Appendix B . Master Invoice For Contractors

Appendix C. Debrief Forms

1. **Course Debrief : Instructor Form**
2. **Course Debrief: Coach Form**

Appendix D. Expectations & Performance Review Forms

1. **Expectations Form: New Instructors**
2. **Performance Review Form: New Instructors**
3. **Expectations Form: New Coaches**
4. **Performance Review Form: New Coaches**

Appendix E. Procedures Documents

1. **Course Delivery Schedule**
   Communications, Mediation, Negotiation, SDM, CDM
2. **Course Delivery Schedule**
   Arbitration

Appendix F. Role Players' Documents

1. **Role-Players' Responsibilities**
2. **The Role Player's Pledge**

Appendix G. Submission Forms for Specialized Training

1. **Specialized Training Submission Form**
2. **Billing Invoice for Specialized Training Courses**
3. **Template for Letter Of Completion For Students**