From: Stan Galbraith [mailto:Stan@galbraith.ab.ca]
Sent: September-02-17 8:48 AM
To: Marshall, Barrie; Paul Conway
Cc: Wendy Hassen; Tammy Borowiecki
Subject: RE: Course Accreditation for Designation purposes

I agree with the changes. Yes, there should be a phone call to Scott in advance of sending the email as it may have an impact on the wording in the email .

Stan

From: Marshall, Barrie [mailto:Barrie.Marshall@gowlingwlg.com]
Sent: Friday, September 01, 2017 12:35 PM
To: Paul Conway
Cc: Stan Galbraith; Wendy Hassen; Tammy Borowiecki
Subject: Re: Course Accreditation for Designation purposes

Paul,

I agree with the comments of both Wendy and Paul and, in particular, that a call to Scott would be helpful. Otherwise I would amend the email as follows:

- Delete the first two paragraphs and replace them with the following:
"Thank you for sharing this draft with ADRIA and for the opportunity to provide the input of our organization at this early stage of the development of this policy. ADRIC is to be complimented on the effort that has gone into this draft. There are some very useful ideas. However, there are some key elements missing. Moreover we have some concerns regarding the process giving rise to this document."

Incorporating Stan's comment about rates, I would add the following to C):
"However, given that this is a policy document it would be preferable to leave out specific fee amounts altogether. Any reference to fees should be to "current rates" or similar language."

Finally, I would delete the final sentence of the paragraph beginning "In sending this draft..." and replace it with:
"It is sincerely hoped that the sending of this draft to ADRIO and ADRIA reflects ADRIC's intention to be fully engaged and collaborative with the affiliates and, in particular, ADRIO in this process going forward."

Let me know what you think. Please also advise if you think a call to Scott before this is sent and if it should be me that places the call.

Sent from my iPhone

On Aug 30, 2017, at 5:22 PM, Paul Conway <paul@adralberta.com> wrote:

Barrie - as per our telephone discussion, this is the response I'd like to suggest be conveyed to ADRIC from our Board. As mentioned, I have liaised with ADRIO, and they are not happy with the process or draft policy. More fundamental to the issue of process, there were no early consultations or

negotiations with ADRIO (or any other Affiliate), and no apparent effort or overture to migrate the ADRIO list. As a consequence, the resultant policy draft is overly complex, and greatly undervalues the service to be offered.

DRAFT Letter to ADRIC from ADRIA Board President (cc ADRIO and others?)

Dear [Scott]

ADRIA has reviewed the draft policy and offers the following feedback and perspectives.

After internal discussion and consultation, ADRIA is not able to support the proposed policy as currently developed and presented for the following reasons:

A) The draft policy is significantly advanced in its development and very detailed, but there is no evidence that it was generated from any agreed principles or with the benefit of early consultation with ADRIO, the Affiliate most affected, and with the most experience in accrediting courses for the purposes of designation approval.
B) The opportunity, and the essential requirement to migrate the current ADRIO listing to form the genesis of a national list seems to have been missed. The creation of a national list is strongly supported, and ADRIA feels it should be a shared strategic priority for ADRIC and all of the Affiliates. Respecting and grandfathering an important Affiliate's current revenue stream should be considered an obvious prelude to negotiating a successful migration, and an option that ADRIA believes ADRIO would be open to.
C) The proposed pricing greatly undervalues the benefit provided. A national listing for a recognized education institution should not be priced below $1000/year, and potentially much higher. Private training providers or small firms might be priced lower, but not below $500/year. Similarly, the cost of evaluating a program must at least cover ADRIC costs (staff and/or volunteer time), and should begin in the $500-$1000 range
D) The issue of revenue sharing is not addressed. There should be a financial incentive for Affiliates to refer local providers to the ADRIC course accreditation process.
E) The distinction between membership and designation education requirements is neither required nor helpful.

The intent to establish written Requirements for Course Accreditation, referred to as Schedules A & B in the draft policy, is fully supported, as is the underlying intent of this policy initiative.

In sending this draft to ADRIA, ADRIO and others, ADRIC has clearly indicated that further engagement and discussion with the Affiliates is forthcoming. However, the detail and advanced nature of the draft policy, apparently crafted without initial discussions and/or negotiations with ADRIO, suggests that we have not adopted best practices in policy development. In keeping with the spirit of our draft MOU, ADRIA encourages ADRIC to begin anew, and engage ADRIO and other interested Affiliates in a collaborative enterprise to create a sustainable national list of ADRIC-approved courses for the purposes of approving designations, both Qualified and Chartered.

The objectives of creating a national list of accredited courses, and the supporting policies, standards and procedures, should include:
- the creation of a national list to replace regional listings;
- consistency of accreditation standards and process across the country;

- a successful collaboration between ADRIC and the Affiliates to benefit our shared strategic intent;
- encouraging training institutions and private ADR trainers to align their teaching materials with ADRIC's designation standards;
- recognizing and attracting training institutions and private trainers that offer ADR training in multiple provinces, out-of-country, or through distance learning
- attracting new members, new corporate members, and more designation applicants; and
- creating a new revenue stream for ADRIC and the Affiliates, while protecting existing Affiliate business models.

ADRIA would welcome the opportunity to participate in or facilitate a working group to tackle these policy objectives.

Signed - Barrie Marshall, ADRIA President, etc

cc TBD

Feedback and/or approval requested.

Paul Conway | ***Executive Director***
<image001.png>
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From: Siemens, Scott [mailto:Scott.Siemens@cra-arc.gc.ca]
Sent: July-20-17 11:36 AM
To: Paul Conway
Cc: Stan Galbraith; 'Marshall, Barrie'
Subject: RE: Course Accreditation for Designation purposes

Great . . . looking forward to whatever insight / contribution you can assist us with.

Scott

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Thursday, July 20, 2017 11:34 AM
To: Siemens, Scott <Scott.Siemens@cra-arc.gc.ca>
Cc: Stan Galbraith <stan@galbraith.ab.ca>; 'Marshall, Barrie' <Barrie.Marshall@gowlingwlg.com>
Subject: RE: Course Accreditation for Designation purposes

I'm reviewing that now with Tammy in order to advise Stan & the Board as appropriate

Paul Conway | ***Executive Director***
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From: Siemens, Scott [mailto:Scott.Siemens@cra-arc.gc.ca]
Sent: July-20-17 11:28 AM
To: Paul Conway
Subject: RE: Course Accreditation for Designation purposes

Thanks Paul. Are you (or any of your ADRIA folks) interested in adding / deleting / editing the draft ?

Scott

From: Paul Conway [mailto:paul@adralberta.com]
Sent: Thursday, July 20, 2017 11:10 AM
To: Siemens, Scott <Scott.Siemens@cra-arc.gc.ca>
Cc: 'Susette Clunis' <ED@adr-ontario.ca>; 'Janet McKay' <janetmckay@adric.ca>; 'Andy Butt' <andrewdbutt@nl.rogers.com>; 'Marshall, Barrie' <Barrie.Marshall@gowlingwlg.com>; 'Stan Galbraith' <stan@galbraith.ab.ca>; j.bell@placet.ca; tammy@adralberta.com; 'Wendy Hassen' <wendy@wendyhassen.ca>
Subject: RE: Course Accreditation for Designation purposes

Alberta believes that there is a need for a national ADRIC list of accredited courses, and that such a list represents an important potential opportunity for revenue generation and sharing. For designation purposes, Alberta currently accepts the courses accredited by ADRIO. ADRIA will assess, accept, reject and/or accredit courses based on our prior experience with these courses or upon request, and while we have the option of charging a one-time fee, it is usually/often waived. This would be the case for the in-province mediation training offered by Mount Royal University, our experience with the training offered by JIBC, NAIT, LESA, etc., and the national training provided by the Ismaili CAB. ADRIA does not post a list of approved courses, nor do we offer an accreditation process (with an assessment and annual fee) to such training institutions.

As there is currently no national list, and we do not maintain our own (revenue-generating) list, there is currently no incentive for ADRIA to encourage other ADR trainers and training institutions in Alberta to have their courses recognized provincially or nationally (ie there is no business case to present). Should this change, ADRIA would welcome the opportunity to approach our Alberta trainers and institutions, and participate in a revenue-sharing arrangement with ADRIC. Recognizing that ADRIO has an existing revenue stream form Ontario trainers, ADRIA would have no objections to fully grandfathering this revenue should the Ontario list migrate to form the basis of a national list.

Paul Conway | ***Executive Director***

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From: Siemens, Scott [mailto:Scott.Siemens@cra-arc.gc.ca]
Sent: July-17-17 4:02 PM
To: Marshall, Barrie (Barrie.Marshall@gowlingwlg.com); 'Stan Galbraith'; 'j.bell@placet.ca' (j.bell@placet.ca)
Cc: Paul Conway (paul@adralberta.com); Susette Clunis; Janet McKay; Andy Butt
Subject: Course Accreditation for Designation purposes

Afternoon folks.

ADRIC has been pondering if / how / when to proceed with establishing a Course Accreditation policy as it relates to pre-approving courses for the purposes of credentialing in our Q/C Arb/Med designations program. Our hope had been to get something out to the Affiliates earlier this year but our attentions have been diverted elsewhere in the past months so we're belatedly getting to this now.

I'm sending this to the Presidents of Alberta and Ontario (copy to E.D.'s) as a starting point given you each have existing training / accreditation programs in place. Though we will certainly engage the other Affiliates before providing anything to any board for approval, we thought it best to have you folks give a first look at this to see where we've missed the mark on things. We feel this can and should be part of the emerging ADRIA Task Force on Education and Designation criteria given any outcome could have the potential to significantly influence the evolution of national standards for which ADRIC is accountable.

Please let me know if this is something you're interested in giving discernment to, and when you think you might be able to have something back to us. I acknowledge mid-July may not be the best time to convene your local folks to review this rough draft, but if you could do what you can to help get those "in the know on these matters" to have a look at this and come back with their questions / affirmations / challenges, it will help us get closer to a place where this can be presented to the PRT for system wide review (and potential ratification) in time to have something in place for Jan 2018.

M. Scott Siemens – C.Med., B.Comm., FICB.

President
ADR Institute of Canada
Scott.Siemens@cra-arc.gc.ca | Tel : 306-517-0348 | Cel : 306-501-0092

Président
l'Institut d'Arbitrage et de Médiation du Canada
Scott.Siemens@cra-arc.gc.ca | Tél.: 306-517-0348 | Cell 306-501-0092

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