



# **Appendix B**

## **Education Planning Template**

## Simple Steps for the Local to Plan Education

### What next?

1. Get input from each Bargaining Unit on the needs of a cross-section of members.
2. Roll up the input into an overall plan – a wish list your Local **can afford**.
3. Submit your plan by **the deadline identified in the President’s Memo**.

### How do I create the plan, step-by-step?

We recommend creating a learning plan that considers your Local and Bargaining Units’ needs for the next two-year period. Thinking of your education needs in a two-year time frame may help your Local and Bargaining Units to prioritize your education needs and to assist the Local in accessing education in a more timely manner. Another best practice includes the formation of a Local “Education Team.” Some Education Teams consider if there is a specific theme or focus for the Local for the coming year. Whether it’s your Executive or a sub-team that starts the planning for your education, we hope you find this information helpful in determining your education needs and budgeting accordingly.

Steps	Purpose	Who Completes it?
Step 1: Complete Appendix 1	To identify workshops the Bargaining Unit leadership team believes Bargaining Unit members need.	<b>Appendix 1</b> is intended for use by Bargaining Unit Presidents. The tip sheet may be a helpful resource to Presidents and their leadership team to identify and prioritize their Bargaining Unit’s workshop needs. The chart is used to record the names of the workshops they would like to schedule. This document is completed by each Bargaining Unit and submitted to their Local Executive/Education Team. See the Education Brochure – Appendix A Identifying Specific Education Needs for Reps in your Bargaining Unit for a list of recommended workshops for the various reps on the Bargaining Unit Leadership Team. If a Bargaining Unit President does not have access to a computer, the Local Coordinator shall print and fax the description of workshops on the website to your leaders.
Step 2: Complete Appendix 2	To identify workshops the Local Executive believes Local Executive members need.	Local Executive/Education Team completes <b>Appendix 2</b> .
Step 3: Complete Appendix 3	To identify workshops for which the Local has identified a need and can afford.	Local Executive completes <b>Appendix 3</b> based on the submissions of each Bargaining Unit President and the Local. Decisions should be based on educating and planning for the succession of seasoned leaders and educating Representatives, committee members, and non-active and Front-line ONA members. If the Local has special requests, we encourage the Local Executive to consult with the Provincial Education Coordination Team (PECT) member at the time of submission. Please ensure your workshop requests are those workshops identified in the Education Brochure. This document is sent to the regional PECT Prime, the regional Vice-President and the Vice-President, Education. <b>Please ensure Appendix 3 is submitted by the deadline issued in the President’s Memo.</b>
Step 4	To provide feedback on the Education Plan submitted and to	The PECT contact shares the education calendar created for the following year to each Local Coordinator that submitted an education plan, who in turn communicates

	notify Locals of scheduled workshop requests.	this information to all Bargaining Unit Presidents and members. It will also be posted on ONA's website after it is approved by the Board of Directors. Approval usually occurs at the December Board Meeting.
Step 5	To ensure PECT is providing education that is relevant and needed.	The Local Executive provides feedback to the PECT contact as needs change and evolve throughout the year, including if workshops are no longer required.

**Summary of Tools to Assist in your Education Planning**

- Planning Bargaining Unit Education – A Checklist (Found in Appendix 1 of this document): This checklist identifies a number of points for Bargaining Units to consider when creating their list of education needs.
- The Education Brochure: Provides the list of workshops from which you create your Education Plans. It also offers suggestions as to which workshops may be beneficial for members of the Bargaining Unit Leadership Team and front-line members.

**Want more information?**

Call the regional PECT Prime or ONA's Vice-President, Education. Contact information for PECT Primes, supporting Labour Relations Assistants (LRAs) and the Vice-President whose portfolio is education can be found in the introduction section of the Education Brochure.



## Planning Bargaining Unit Education: A Checklist

When you are determining your Bargaining Unit's education needs for the following year, it may be helpful to consider the following points in conjunction with the most recent Education Brochure:

- Is it a negotiating year?
- Is it an election year?
- Are there any labour relations trends (i.e. grievances, member concerns, etc) in the following areas that might be improved with education?
  - Workplace Safety and Insurance Board (WSIB).
  - Professional Responsibility Complaints (PRCs).
  - Skill mix changes in your workplace.
  - Health and Safety.
  - Attendance Management.
  - Bullying.
  - Human Rights.
  - Disability Income Protection Plans.
  - Return to Work/Accommodation.
  - Addiction issues.
- Have you considered the pathways outlined in the Education Brochure for Bargaining Unit Representatives and prioritized them according to your Bargaining Unit's needs?
- Do you anticipate turnover, are you succession planning or are you trying to recruit for any of the following positions?
  - Bargaining Unit President.
  - Workload Reporting Representative.
  - Health and Safety Rep.
  - Human Rights and Equity Representative.
  - Grievance Chair.
  - Negotiations Team.
  - Unit Reps.
- Are there mentor relationships established in your Bargaining Unit leadership team?
- Is there conflict among the Bargaining Unit members?
- Is there a high degree of apathy in your Bargaining Unit?
- Are a large number of grievances being filed?
- Are there a large number of arbitrations scheduled for the upcoming year?
- Are there any provincial education workshops, i.e. Health and Safety education at the Area Coordinators Conference (ACC), Hospital Contract Interpretation or education in conjunction with the Provincial Coordinators Meeting (PCM) that might meet the needs of your Bargaining Unit?



## Education Plan for Submission – Appendix 3

This chart is completed by the Local Executive/Education Team based on Bargaining Unit and Local needs. Please submit your requests for only the upcoming year.

Please complete all of the columns below for each workshop request including the quarter in which you would like to have all training delivered; the location; if the education would be attached to an Executive meeting or an Area Coordinators Conference (ACC); and the number of members you wish to attend. PECT needs this information in order to create a workshop calendar that best meets the regional and provincial needs. Once completed, submit this to the regional PECT Prime, regional Vice-President and the Vice-President, Education by the date stated in the President’s Memo.

**Note:** Workshop requests are limited to only those workshops that are listed in the Education Brochure.

Local #: _____
Local Coordinator or Designate: _____
Phone: _____
Fax: _____
E-mail: _____

<b>Workshop request</b>	<b>When would you like the workshop? 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> or 4<sup>th</sup> quarter</b>	<b>Where would you like the workshop? i.e. suggested location</b>	<b>Is this workshop attached to a meeting? If so, when and where is the meeting?</b>	<b>How many members does your Local plan to register?</b>