

Planning a Local Educational Event

Some basic information

OPSEU Policy encourages local education:

Section 7.3 of the OPSEU Policy Manual outlines a commitment to expanding local education:

- OPSEU recognizes that local education expands participation for more members
- Child care will be provided on-site where there is sufficient demand or members will be reimbursed for dependent care at home
- OPSEU encourages locals to amend their by-laws to include a Local Education Officer on the Local Executive committee
- Anyone recognized under OPSEU's constitution may sponsor a local educational – i.e. locals, area councils, bargaining units, equity committees, etc.

Locals can seek funding support from their region:

The local can fully fund its own event and/or it can apply to its region for funding support. (See below for expenses covered by the region.) This will require approval by an executive board member and staff representative from the region and/or department within OPSEU.

The costs eligible for reimbursement from the regional budget include:

- The cost of the meeting room
- Member expenses – travel and childcare, as per policy
- AV rental, photocopying
- Services for special needs participants
- A meal and/or coffee are usually arranged by the Local. If not, members can claim as per policy

NOTE: lost wages and/or own time will **NOT** be reimbursed.

Why would our Local Want to Host its own Education?

You may be a newly elected executive, or you may have new, untrained stewards; you may be facing anti-union employer tactics, or want to break through the apathy of your local. Whatever the reason, you might consider organizing education in your local. But your participants and the topics will depend on what you're trying to do.

To help you clarify your goals for providing local education, take a moment to fill out the chart below.

Reason(s) we want local education	Yes	No
Increase diverse member interest and participation in the local		
Recruit new activists and/or stewards more representative of the membership		
Deal with a current local issue such as accommodation, harassment, successor rights, tensions between groups of members, etc		
Familiarize temporary workers with the union and how it works for them		
Strengthen specific local leadership skills		
Get a labour management committee up and running		
Help other local committees work more effectively		
Increase equity and inclusiveness in the local		
Improve meetings and communications in the local		
Assist members to understand a new bargaining priority		
Orient new members		
Other		

Local education sessions can be designed to “fit the needs” of the specific members attending and the union-building goals of the local.

For example, depending on when members are available, the local could organize lunch and learns; or fit education into already-scheduled meetings of a committee; or provide a course of 11 hours over two days either on a weekend or weekdays, or over a few evenings.

Step by Step Planning of your Local Education Event

1. Decide on which focus group– e.g. stewards, executive committee, part-time members, etc – you want to attract, based on your responses to the chart above.
2. Consult with target participants on their current concerns and skill needs.
3. Decide on topics, based on expressed interest & needs of target participants.
4. Develop a communication strategy that will ensure you reach these members (e.g. e-mail, Facebook, flyer, phone tree, steward orientation to reach members, etc. This is especially important if your education is designed to reach uninvolved temporary workers, for example.)
5. Set the date(s) and time(s) based on availability of a location and the people you're attracting to the education.
6. Choose and tentatively book a fully accessible location – regional office, church, community centre, meeting room.
7. Communicate the details of the event including the registration process to the target participants. Clarify with potential participants what expenses they will be allowed to claim.
8. Confirm participants – numbers, names and contact information
9. Confirm availability of suitable facilitators – preferably a staff and member co-facilitation team.
10. Prepare a detailed cost estimate which includes transportation and family and dependent care costs. This will be important for accounting within your local, and also if you are applying for support from the Region.
11. Fill out and submit the Request for a Local-sponsored Event form (see below or on line) and send it to the Regional Education Committee for approval with a copy to your Staff Representative. *(Your Regional Education Committee normally consists of your 3 board members, plus staff. For names & coordinates of board members click on <http://www.opseu.org/ContactUs/executiveboard.htm>)*

Once you have confirmed funding:

1. Confirm your meeting location
2. Send a confirmation notice to all participants; include the time/date/location
3. Contact the facilitator(s) assigned to inform them of the number of participants, time, date and location, and to provide materials well ahead of time
4. Work with your regional secretary and staff rep to get educational materials printed. There are some tools on line <http://www.opseu.org/membereducation/activities-and-tools.htm> but normally the materials required are accessible through your regional office.
5. Work with your regional secretary to get the meeting register printed and to ensure you have the proper expense claim forms. You can print the *Membership Expense Claim non-Wage Replacement Form* from the OPSEU website <http://www.opseu.org/forms/index.htm>

After the event

1. Send the originals of the meeting register, member expense forms (member initials they have received payment from the Local), receipts for meeting room, meal(s) (if provided), AV, etc. to the Accounting Department at Head Office for reimbursement

Note: Keep copies of all of the above

If your local's designated contact person received an advance, a cheque made payable to OPSEU for all unused funds must accompany the above documentation.

Note: If all of the above are not received, the full advanced amount will be deducted from your next Local rebate.

2. Conduct an evaluation of the impact of the education on the members and the local (see sample evaluation template below, for adaption to your local's needs)

If you don't receive regional funding approval

You can still proceed with your planned event but the local would be responsible for all costs.

Sample Template: Assessing the Impact of our Local Education

Thanks for attending our recent local steward training. Please help us assess the impact of our education by filling in the checklist below and sending it back to us. Your responses will help your local executive committee a) make adjustments to future local education and b) provide necessary supports to you.

Results of the training	Yes	Some-what	No
1. You decided to stay on as a steward			
2. You knew how to assist a member in handling informally, a workplace issue			
3. You handled a grievance at the first stage and felt you did it effectively			
4. You knew how to assist a member in a return to work or accommodation			
5. You have pulled your members together to discuss common workplace issues			
6. You've intervened in disrespectful treatment or bullying between members			
7. You have defended a member's right to accommodation or freedom from harassment to other members and/or the employer			
8. You have applied learning to local committee or LEC work. If so, specify how:			
9. You have reported to the LEC what you've learned and how the local might apply the training			
10. Other ways you have applied the training?			

What, if any, other ways can the local support you in doing a good job as a steward? Please be as specific as you can:

Request for a Local-Sponsored Event (page 1)

Local #: _____

Local contact person: _____

Phone number and secure email of local contact person:

Course(s) requested: _____

Course date(s): _____

Course times: _____

Course facilitator(s): _____

Participants:

	Member ID	Name	Contact Information (address, telephones, email)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

Request for a Local-Sponsored Event (page 2)

Expense Information

Item	Details	Budget
Meeting room		
Instructor(s)		
Transportation		
Meals/Coffee		
AV equipment etc.		
Child and dependent care		
Other? (e.g. member needing accommodation because of distance)		
TOTAL		

- The Local will pay all expenses and submit all receipts to the secretary of your regional office. The secretary will send your submission to the Regional Education Committee for approval and reimbursement after the event.
- The Local will require an advance in the amount of \$_____ to be made payable to _____ (designated contact for the local).

Signature of two Local Officers:

1. _____ Position: _____

2. _____ Position: _____

Send to: The OPSEU _____ Regional Office (insert address)