Report to the ADR Institute of Canada Board of Directors

Results of Consultation and Proposed Next Steps re "Under 40" Engagement

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Table of Contents

I. Background **3**
- **A. Introduction** **3**
- **B. AD HOC Subcommittee Mandate** **4**
- **C. Executive Summary of Results** **4**

II. Who is this Target "Under 40" Population? **6**

III. Base of Knowledge: Establishing Where We Are Now **7**
- **A. Process for Data Collection** **7**
- **B. Results of the Collection** **8**
  1. Membership Categories 8
  2. Discounts for Age or Gender 8
  3. Metric and Statistics 8
  4. Specific Benefits based on Age or Gender 9
  5. Targeted Email Distribution Lists 9
  6. Member Succession Planning 10

IV. Generating Ideas: Where Can We Go From Here? **10**
- **A. Standardizing Statistics** **11**
- **B. Providing "Real" Benefits and Opportunities for Young Neutrals** **12**
  1. Networking 12
  2. Mentoring 13
  3. Work Opportunities 15
  4. Profile Raising 16
- **C. Opening New Markets Beyond Neutrals?** **17**

V. Next Steps **19**

Schedule "A" [separate PDF]

I. Background

A. Introduction

It is expected that the "baby-boomer" generation will see its youngest members retiring from active practice or reducing full-time practice within the next 15 years.[1] A common perception across the affiliates is that this "generational shift" will have a major impact on current membership numbers. The purpose of this report is not to question the underlying assumption that affiliates would like to grow, or at least replace, their membership base or to consider the financial incentives or issues for doing so. Rather, one of its purposes is to identify best practices and further issues for consideration in engaging with the "under 40" age category.

The responses to our consultation revealed a major tension about what it means to be a "member" of our organization and who "should" be a member. In particular, are we an organization primarily dedicated to training "neutrals" in arbitration and mediation, or do we want to encourage activities outside of neutral training to engage more actively with, and potentially offer training to, other ADR users? In other words, just how big do we want our ADR "umbrella" to be? Why does "membership" drive our business generation activities? All of these questions will be discussed in more detail below.

The consultation also revealed a widespread bias amongst our members that young people ought to "wait" until they are much older to pursue a career as a neutral. If that is true, we have to critically examine why young people would have any incentive to join our organization now and, if so, what real benefits we could offer them. If our older members are soon retiring, but young people must "wait" to become neutrals, we will likely face significant succession and growth problems in the near future. Consequently, given this "age bias", we question whether it is time to expand our training programs and consider new designations or training available to non-neutrals in order to connect now with younger people who (according to the bias) should not become neutrals for at least another 5 to 20 years (of course, expanded training may also be attractive to people of all ages).

In this report, we summarize the consultation process undertaken and the results. We raise some new questions that our organization will need to consider and resolve to meaningfully move forward with any marketing initiative aimed at young people.

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[1] The 2016 Canadian census found that the ranks of seniors grew by 20 percent between 2011 and 2016, the fastest rate the census has recorded in 70 years. Over 5.9 million seniors were counted in 2016. Depending on "generational definition," the youngest "baby boomers" are expected to turn 65 within the next 14 years, by 2031.

B. AD HOC Subcommittee Mandate

In 2017, ADRIC created an AD HOC subcommittee to its Marketing and Membership Committee, chaired by Michelle Maniago, to consider potential engagement strategies aimed at the "under 40" population, with a sub-focus on engaging new women members (the "**Subcommittee**").

The Subcommittee recognized that to move forward meaningfully with its mandate, it needed first to obtain data to understand the current situation regarding membership and engagement strategies across the country, and then identify possible best practices and generating ideas for the future. In the later stages of this initial consultation, Don Shapira of ADRIA in Calgary provided substantial assistance, as discussed in more detail below.

Through the Marketing and Membership Committee, we intend to share this final report, along with any comments received from the ADRIC national board, with the affiliate presidents and executive directors. We hope that by sharing these ideas, comments and strategies nationally we can develop initiatives and programs to attract, encourage, and sustain revenues that will continue to support all of us for many years to come. This report will also allow the Marketing and Membership Committee to make an informed decision regarding any ongoing or formal mandate of, and potential expanded membership structure for, the Subcommittee.

C. Executive Summary of Results

As explained in more detail below, the Subcommittee has identified the following issues for further consideration and action:

For Membership Related to Neutrals

- *Standardize demographic information collected at member application/renewal stage*
- *Create (and use) email distribution lists with targeted opportunities for "under 40" practitioners*
- *ADRIC and affiliates to coordinate communications about marketing opportunities to end users by members, including in electronic media*[2]
- *Consider and develop other opportunities to connect end users with members*

[2] Generally speaking, it appears from survey feedback that better coordination of communication to members between the affiliates and ADRIC is desirable. That should be a topic for consideration by the MOU Taskforce, as the survey results were not comprehensive enough to provide further commentary on that issue here.

- *Consider all formal and informal mentoring initiatives offered by ADRIC and by the affiliates, including their uptake and effectiveness, and identify best practices*
- *Consider adopting formal requirements for mentorship opportunities within roster appointments to incentivize uptake*
- *Consider informal mentoring opportunities and tailor them specifically to the under 40 age group (such as an "under 40" seminar, networking evening, or facilitating connections to enable younger and older members to form mentoring relationships)*
- *Ensure that committee or task force opportunities are highlighted to members, and that representation of "under 40" individuals is particularly sought out*
- *Consider opportunities and benefits that could be offered to those individuals without designations, but interested in ADR*
- *Identify and lobby to create more roster opportunities at the local and national level for designations at the "Q" and "C" levels*
- *Expand efforts to promote ADR to the public, including at universities and in the business community*
- *Expand efforts to promote ADR listings (including ADR Connect) to the public*
- *Consider alliances and collaboration with a variety of interest groups at the university or college level to promote ADR and the designations*
- *Consider alliances and collaboration with a variety of interest groups to improve diversity among members*

Other Revenue Generation Ideas

- *Consider diversifying revenue sources beyond designations and membership fees, to open new markets and create new revenue sources, such as stand-alone ADR courses, workshops, and certificates for non-neutrals*
- *Consider leveraging already existing ADR courses or conferences, or developing new ones, aimed at assisting professionals in other fields to maintain their designations by offering content that qualifies for their continuing education or professional development requirements.*

Some of the above issues are currently being considered by other subcommittees or task forces, such as the MOU Task Force, and overlap in the work between groups should be avoided where possible.

Finally, the Subcommittee requests that if it is to be continued, that its mandate and focus be confirmed as discussed in Part V "Next Steps".

The Subcommittee would like to thank all the individuals, affiliates, corporate members, and staff and executive directors who provided comments throughout this process. In particular, it would also like to thank the co-Chairs of the Marketing and Membership committee, Bill Harnett and Jim McCartney, and ADRIC Executive Director Janet McKay, for their support and feedback throughout.

II. Who is this Target "Under 40" Population?

The "under 40" designation includes a wide range of individuals, obviously including people at vastly different stages of their careers. The older range of this demographic was born in the late 1970s and its younger members were born in the mid 1990s.[3] Some are very busy with young families, and ailing parents, in addition to trying to build their careers.

It is well documented that generational attitudes towards career longevity have shifted over time, where the norm is that younger workers no longer expect to remain in the same job, let alone the same career, for all of their working years. Indeed, studies now suggest that younger professionals may shift their careers (not just their employer) multiple times, and the expectation of working in a single company throughout their working years is much more rare.[4]

The practice of ADR as a neutral has, for reasons beyond the scope of this report, a strong bias towards older practitioners, where an assumption pervades that only those that are above 50 years of age can offer meaningful service. This bias has been repeatedly referred to during the course of the Subcommittee's work. Such a bias to entry makes it hard for younger persons who are interested in becoming neutrals to get the experience necessary to build a business in ADR while young.

In the view of the Subcommittee, this background matters for three primary reasons:

- First, even the most promising and senior individuals in the "under 40" category are likely at least 5-10 years away from regularly acting as arbitrators or mediators, *if they ever develop into that career stream at all*.

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[3] Generational definitions are particularly in flux for this group. The upper range was traditionally considered to be the last of the "gen X" generation, with the younger members part of a so-called "millennial" generation (often defined to include those born in or after 1980 until 1995). The dividing line between these generations is much in debate, but often drawn sometime in the early 1980s (although those born in the early 1980s (now in their mid to late 30s), are in a far different career stage than those born in the mid 1990s (now in their early to mid 20s).

[4] See for example: Sean T. Lyons, Eddy S. Ng and Linda Schweitzer, "Generational career shift: Millennials and the changing nature of careers in Canada" in Managing the New Workforce: International Perspectives on the Millennial Generation (Edward Elgar: Northampton, MA, USA, 2012), chapter 4.

Some will remain as advocates of ADR, without ever taking on a neutral role. Many are already or will become "end users" of ADR in their every-day job.

- Second, it is important to recognize that major career shifts will likely occur throughout these younger individuals' lives. Consequently, the impact of ADRIC or the affiliates may well be felt years after initial exposure to the organization.[5]

- Finally, for those young individuals who are interested in becoming neutrals, we must critically examine what real opportunities and benefits exist within our organization given the general bias towards hiring older neutrals. This will be discussed in detail below.

III. Base of Knowledge: Establishing Where We Are Now

A. Process for Data Collection

In March 2017, a questionnaire was circulated to all Affiliates. The questionnaire requested that each Affiliate:

1. Confirm membership categories offered;

2. Confirm whether discounts are offered based on age or gender;

3. Confirm whether it keeps the following metrics/statistics:
    a. Women vs. men with C.Arb or C.Med designations;
    b. Women vs. men with Q.Arb or Q.Med designations;
    c. Women vs. men with no designation;
    d. Total women vs. men;
    e. Members under 45 (or other "youth" age metric); and
    f. Members over 65 (or other "senior" age metric);

4. Confirm whether it offers specific benefits (such as networking opportunities) aimed either at women exclusively or members based on their age;

5. Confirm whether it has email distribution lists aimed specifically at women or younger members; and

[5] This reality may not be of surprise to ADR practitioners: in its response, ADRIA commented that, in its opinion, ADR is often a second or third career; its members often leverage their past career (and contacts) to sustain their transition to the ADR business.

6. Comment on how, if at all, it is currently preparing for member succession planning (i.e. attracting new, younger members).

B. Results of the Collection

Responses were received from BCAMI, ADRIA, ADRSK, ADRIM, and ADRIO. As the results discussed in more detail below show, the above statistics were not held by the affiliates or otherwise not readily available. With the exception of ADRIA, little has been implemented for long-term succession planning.

1. Membership Categories

Membership categories, including the definitions for membership, vary widely across the country. The May 2017 ADRIC board update from the MOU Task Force suggested that it was exploring ideas to standardize membership categories nationally.

2. Discounts for Age or Gender

None of the affiliates who responded to the questionnaire offer gender-focused discounts.

Some of the affiliates offer "student" and "retired" membership categories, which may, but do not necessarily, align with age.

3. Metric and Statistics

None of the affiliates who responded to the questionnaire indicated that they keep any of the statistics listed above in 3(a) to (f). ADRIA provided its estimate that women form the majority of its membership, and approximately two-thirds of its student learners.

ADRIA also referred to a 2015 survey of Alberta ADR professionals, which suggested the following metrics for the province of Alberta:

- Approximately 70% of ADR practitioners are women

- Of the total ADR practitioners, approximately 70% are over 50 years of age, 20% are 40-49 years of age, and 10% are under 40 years of age.

Although BCAMI initially indicated that it did not keep any of the statistics, it later suggested that several of the data points could be mined from its statistics. Given the

general lack of data kept by the other affiliates, the Subcommittee did not pursue BCAMI's offer to obtain its metrics at this time.

In 2017, the national total of individuals renewing their designations was 815, breaking down by designation type as follows:

Designation Type	# Holders 2017
C.Arb Annual Renewal	92
C.Med Annual Renewal	238
C.Med and C.Arb Annual Renewal	54
Q.Arb Annual Renewal	100
Q.Med Annual Renewal	290
C.Arb and Q.Med Annual Renewal	4
C.Med and Q.Arb Annual Renewal	18
Q.Arb and Q.Med Annual Renewal	19

4. Specific Benefits based on Age or Gender

Specific benefits for "student" and "retired member" categories exist, but vary across the country (see Schedule "A").

With the exception of ADRIA, none of the other responding affiliates identified further specific benefits.

ADRIA indicated that it provided financial sponsorship of events, substantive presentations, and other similar types of benefits to younger audiences through the following:

- ADRIA has partnered with Peer Mediation and Skills Training ("**PMAST**"), who offers ADR support programs in high school, particularly focused on anti-bullying and conflict solutions; and

- ADRIA also supports student groups, such as the "Resolve Club" at the U of A law school and the U of A business school's "SMO Club".

5. Targeted Email Distribution Lists

None of the responding affiliates have targeted email distribution lists focused on gender or age.

6. Member Succession Planning

With the exception of ADRIA, none of the other responding affiliates identified any practical steps or strategic initiatives they are taking to prepare for succession planning, including attracting new, younger members.

Some were quite blunt that they had not turned their mind to the issue at all.

ADRIA provided the following description of its current activity:

> *ADRIA supports and partners with ADR organizations that promote ADR support programs in high schools (PMAST) and universities (Concordia, U of A, Mount Royal University). Not all such students are "young", but certainly the majority are.*
>
> *We are also exploring summer student and internship opportunities as they arise.*
>
> *Worthy of note, our own educational program for mediators and arbitrators attracts some younger students – but we are very careful to advise all of our students that it is difficult to find full time viable income from ADR alone.*
>
> *We also provide training in how to start an ADR business.*

IV. Generating Ideas: Where Can We Go From Here?

The second phase of the Subcommittee's work was aimed at identifying gaps in knowledge, identifying further discussion topics, and generating ideas for growth. To this end, a memo with a short questionnaire was circulated to all affiliate presidents and executive directors, with the request that it be shared with their boards and with their members, as they saw fit. ADRIA shared the survey with its members through an email newsletter request for response, and other affiliates may have also circulated it widely.

The short questionnaire consisted of five questions:

1. If you were approached by someone under 40 years of age who has an interest in building a business in ADR, what advice would you give if asked?

    - *Would this advice change if the person said they wanted to be an arbitrator, mediator or facilitator (and if yes, please describe how so)?*

2. Should someone under 40 years of age be interested in ADRIC/local affiliate now? If yes, why? What kinds of benefits should they receive from us?

3. If someone "under 40" wanted mentorship in an ADR practice, what opportunities can provide this?

4. What successful marketing approaches have you seen (or heard of) used in conjunction with marketing to the "under 40" population?

5. Do you have any other comments about ADRIC or its affiliates engaging with the "under 40" population to increase membership within this age demographic?

The responses received were detailed and thoughtful. As well, some one-on-one meetings and telephone calls were held to discuss the topic. Certain boards discussed the topic internally and provided feedback in a summary way.

The below commentary incorporates the feedback received, organized topically.

A. Standardizing Statistics

With the new iMIS platform, membership applications could be standardized to request the same metrics from applicants (or renewing members) in each region. From this, local and national statistics could be derived. Doing so would also allow, for example, specialized email distribution lists to be created as applicants (or renewing members) could opt in to communications specifically targeted, for example, to women or the "under 40" category.

Collection of metrics will assist in long-term planning both at the local and national level, especially so we can determine when to expect the majority of our members to retire. This data collection could be as easy as asking members, again through the renewal or application process, to self-identify their age within an age brackets (e.g. "20-25, 25-30, 30-35," etc.) rather than providing their actual date of birth so we can obtain rough age demographics. Of course, other demographics could also be collected and would be useful for a variety of planning initiatives.

This topic should likely be raised at the President's roundtable, and be made a topic for the MOU Task Force, in conjunction with the working group tasked with considering whether to standardize membership categories.

Subcommittee Recommendations:

- ***Standardize demographic information collected at application/renewal stage***

- ***Create (and use) email distribution lists with targeted opportunities for "under 40" practitioners***

B. Providing "Real" Benefits and Opportunities for Young Neutrals

> "*ADRIC offerings are geared towards professionals who are already established in their ADR career*." – Survey Respondent

The common general advice that survey respondents provided about developing a business in ADR is that young people need to build their network of contacts, find a mentor, and develop their skills through training, volunteering and paid practice. As well, new practitioners should not "quit their day job" as a business in ADR is often not enough to sustain a living especially at the beginning of an ADR career, if ever.

The perception of many is that ADRIC and the affiliates provide (1) a network of practitioners who are available for advice, support and mentorship, and (2) access to ADR information and training (including but not limited to designations, which can be used to demonstrate legitimacy for potential clients). Some survey respondents mentioned the availability of insurance as a benefit.

Many respondents mentioned the need for "real" benefits and opportunities targeted at those under the age of 40 in order to attract and retain them, as the benefits and opportunities are perceived as being primarily focused on those who have already developed an ADR career. These comments are explored further in the sub-sections that follow.

1. Networking

While ADRIC and the affiliates provide a network of practitioners, many survey respondents commented that the networking potential through ADRIC/the affiliates to increase exposure to *potential clients* is extremely limited. A few also stated that it was unlikely that older neutrals would refer work to more junior neutrals (indicating that the perceived real value of networking with older practitioners by junior practitioners is in obtaining mentoring opportunities, which is discussed next).

In the Subcommittee's view, there are several opportunities for new and young practitioners to connect with potential clients that could be further developed and better marketed. For example, there are the opportunities to publish short articles in ADRIC's electronic newsletter (ADR Perspectives) that is sent to many in-house counsel and other "end users" of ADR. ADRIC also intends to develop several webinars that could provide potential marketing platforms for individuals to showcase their expertise to potential clients. National ADRIC conference and local seminar speaking spots are another opportunity to increase exposure to ADR end

users. There are likely many more such opportunities across the country and these should be identified and emphasized in coordinated marketing efforts.

Subcommittee Recommendations:

- ***ADRIC and affiliates to coordinate communications about marketing opportunities to end users by members, including in electronic media***

- ***Consider and develop other opportunities to connect end users with members***

2. Mentoring

> *"'As it Happens'* [on CBC] *last night interviewed a group of young men who put out an advertisement on social media for a 'grilling dad' – an older person to come and grill burgers and offer encouragement (like a dad would) to the group for an evening. As bizarre as this sounded to me, they have had several applications and they have chosen a person who, because of what he is currently going through, will benefit as much from their interaction as they will his. It's examples like this that we will need our younger people to assist with our path forward."* – Survey Respondent

Certain of the affiliates offer formal and informal mentorship/apprenticeship programs, which connect younger/less experienced neutrals (or other junior and interested persons) with more senior neutrals. For example, Saskatchewan offers a formal mentorship opportunity in both the mediation and arbitration fields where certain of its neutrals who accept roster assignments on certain types of disputes must agree to take on a mentee and provide three hours of one-on-one coaching support beyond the mentee's involvement on a file. Ontario also offers an internship program within the mediation field for junior full members of ADRIO to obtain a total of 80 hours of supervision on at least three cases from senior practitioners. Completion of the program counts towards two completed co-mediations, towards the Qualified Mediator designation.

Informal mentorship meetings are also offered by some affiliates that are supportive of new or aspiring neutrals. In Saskatchewan, for example, in Saskatoon (2016) and Regina (expected in fall 2017), monthly meetings were/will be held where participants read assigned readings in advance and participate in "mock mediations", supported by C.Med's who also participate. One survey respondent mentioned that Manitoba recently hosted a facilitated dialogue with a guest speaker, which was well attended (including by several university students).[6]

[6] The above formal and informal examples of mentorship are not necessarily descriptive of all mentorship activities that is occurring across the country, but with the lack of response from certain regions, the above summarizes the primary activity reported to the Subcommittee.

Other survey respondents say that there were no mentorship opportunities available through the affiliate (whether or not that is actually correct), highlighting the importance of emphasizing such opportunities where they exist. Websites should be updated to reflect the current opportunities available.

Survey respondents who are not lawyers in law firms especially placed an emphasis on the value of mentoring. This is perhaps not surprising given that many law firms try to recruit younger lawyers to develop "bench strength" at different years of call and make succession planning easier; mentoring is a large part of the "apprenticeship" within a firm. Without the structure of a firm, mentorship is more difficult to obtain.

In the Subcommittee's view, great benefit for our younger neutrals (and other interested persons) could be derived if all affiliates could offer effective mentoring programs.[7] For our members, they would benefit from the mentor/mentee relationship itself and the affiliates could potentially benefit through using the mentoring program to attract new members.

Thoughtfully organized informal seminars, with networking time, could both be an engaging and informative way for older practitioners to engage with younger practitioners. To attract many to attend, pricing should be kept as low as possible, and there could be a member's price (if any) and a non-member's price for attendance. This will also provide an opportunity for peer-to-peer networking, so that "under 40" practitioners can meet and develop networks with other "under 40" practitioners in a non-competitive environment.[8]

Likewise, committee or task force opportunities should be highlighted to members (including individuals at corporate members, where appropriate), with a focus on encouraging participation of younger members. Many younger members are keen to learn and to become more involved, but the path to doing so is not always clear. "Vacancies" on committees could be advertised by email or on websites. With a targeted email distribution list, particular emphasis of these opportunities could be sent out to the "under 40" email distribution list to encourage participation and diversify committee membership.

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[7] The importance of mentoring programs is also recognized and embraced internationally, with many senior practitioners volunteering their time for "moot" competitions, such as the Willem C. Vis International Commercial Arbitration Moot (vismoot.pace.edu), and for the ICCA's mentoring program (which mentors and mentees agree to work together for 2 years, see: www.arbitration-icca.org/YoungICCA/mentoring.html).

[8] For example, the Young Canadian Arbitration Practitioners is a national organization that routinely offers seminars with panels of experienced arbitrators, aimed at providing practical advice for young arbitration counsel (www.ycap.ca). The seminars are often followed with time for networking. These seminars are often free for their members to attend and a nominal fee applies to non-members (such as students or other interested persons). They are generally well attended and often organized to align with major national or regional arbitration-focused meetings or conferences.

Another option is to facilitate the forming of mentoring relationships between younger and older members. This could be as simple as an email request to members to see who would be willing to act as a mentor (and who would like to be a mentee), and then connecting those individuals initially by email and letting them then form their own mentoring relationship if desired.

It is also worth considering what kind of opportunities we can offer those members without designations, including student or "interested" or "ADR friendly" individual members, to retain them as part of the network. These individuals may never ultimately become neutrals, but may become significant sources of work for our members if they value the services we provide.

Subcommittee Recommendations:

- ***Consider all formal and informal mentoring initiatives offered by ADRIC and by the affiliates, including their uptake and effectiveness, and identify best practices***

- ***Consider adopting formal requirements for mentorship opportunities within roster appointments to incentivize uptake***

- ***Consider informal mentoring opportunities and tailor them specifically to the under 40 age group (such as an "under 40" seminar, networking evening, or facilitating connections to enable younger and older members to form mentoring relationships)***

- ***Ensure that committee or task force opportunities are highlighted to members, and that representation of "under 40" individuals is particularly sought out***

- ***Consider opportunities and benefits that could be offered to individuals without designations***

3. Work Opportunities

Our organisation has secured certain opportunities for the "Q" and "C" designations to obtain exclusive work opportunities through roster appointments. Obviously, such benefits need to be marketed heavily.

Some survey respondents stated that ADRIC and the affiliates could greatly benefit them by more aggressively promoting ADR and the "Q" and "C" designations to government and other potential clients to obtain exclusive opportunities for those with the designations (at both the "Q" and "C" levels) to be included on hiring rosters. In particular, more opportunities are needed at the "Q" level in order to

assist members with obtaining their "C" designations. This is all the more important given the general "age bias" within ADR, and more "Q" level roster opportunities should result in more work for younger members and allow them to build the experience they need to acquire for a successful ADR business.

As well, some survey respondents suggested that more should be done to promote ADR, ADR listings (in particular ADR Connect), and the designations to the public, which again, in turn, may result in more paid work opportunities.

Subcommittee Recommendations:

- ***Identify and lobby to create more roster opportunities at the local and national level for designations at the "Q" and "C" levels***

- ***Expand efforts to promote ADR to the public, including at universities and in the business community***

- ***Expand efforts to promote ADR listings (including ADR Connect) to the public***

4. Profile Raising

Many survey respondents noted that we must continue to raise the profile of ADRIC and the affiliates both for the purposes of attracting new members and to inform the public about the designations. Universities and colleges were regularly mentioned as targets for such marketing. This would be particularly effective if such initiatives could be combined with the promoting of mentorship programs, discussed above.

Some comment was also offered about the diversity of practitioners (or lack thereof), as one survey respondent observed that most arbitrators are "*male, pale, and stale*". ADRIC and the affiliates could lead a push in increasing the diversity within the field across a whole series of markers (including age, gender, and cultural background) which would result in members better reflecting end users. This would require thoughtful marketing to a range of groups not traditionally represented (or disproportionately under-represented) within our individual membership. Such initiatives may be outside the current mandate of this Subcommittee, but the issue is worthy of note and specific future consideration.

Subcommittee Recommendations:

- ***Consider alliances and collaboration with a variety of interest groups at the university or college level to promote ADR and the designations***

- ***Consider alliances and collaboration with a variety of interest groups to improve diversity among members.***

C. Opening New Markets Beyond Neutrals?

Is it now time to broaden our scope to other markets?

Take for example the teacher, guidance counsellor, human resources coordinator, or social worker – all are likely very interested in ADR training (as they will use ADR frequently as a part of their jobs) but will never see the Q.Med or C.Med as particularly useful designations for their career. These individuals include but are not limited to those under 40 years of age.

Some survey respondents stated that short seminars and webinars, workshops, and even advanced "certifications" in ADR techniques, but not focused on true neutral training, could be a huge source of potential interest and revenue generation. It would also be of relevance to those "under 40" now (rather then in 5-20 years when (and if) they become neutrals). Materials already created for the designations could be leveraged for use in such training. In particular, seminars or conferences could be designed to give attendees the types of ongoing education or career development "credits" they need to maintain designations in other fields. If so, these credits must be obtained on an annual basis, and could become a regular and somewhat predictable source of income.

An immediate application of this idea is to try to qualify the ADRIC National Conference and local seminars for such credits, like is often done for the law societies. The conference structures may not need to change, and for little additional work we may gain significant additional numbers of attendees.

Trainers (or speakers) for programs could be drawn from our traditional membership of individual and corporate members. Of course, such an approach could be viewed by some members with active training businesses as us trying to compete with them. This is a sensitive topic, but there may be way to accommodate all interests and further consideration of such initiatives is warranted.

If a "certification" intended for non-neutrals is created, it could have annual training and other fees associated with it, like our existing designations.[9] Again, this could be an additional new revenue source, and may be very attractive to someone who is young and wants to establish themselves as a leader in the field (even if not as a neutral).

To provide some practical feedback to the above, Don Shapira (Q.Med, member through ADRIA) volunteered to circulate a short survey to his contacts with Certified Human Resources Professional ("**CHRP**") designations on behalf of the Subcommittee, to gage interest in the above. CHRP, like other professional designations, requires that annual continuing development/education courses be

[9] The Subcommittee understands that ADRIA is currently considering such initiatives in mediation and negotiation training for non-neutrals.

taken to be maintained. Don asked several of his contacts to rank the following statements (on an anonymous basis) with "strongly disagree", "disagree", "neutral/neither agree nor disagree", "agree" or "strongly agree", and eight replied as follows:

1. I believe that Alternative Dispute Resolution training would assist in my job performance.

   8 respondents replied "agree" or "strongly agree"

2. I would like CHRP to have Alternative Dispute Resolution training offered for Professional Development.

   8 respondents replied "agree" or "strongly agree"

3. I am aware that Mediation, Negotiation and Communication training, and designations, are available through ADRIC.ca

   7 respondents replied "disagree" or "strongly disagree"

   1 respondent replied "agree"

4. I believe that a designation in Alternative Dispute Resolution would assist in my career aspirations.

   5 respondents replied "agree" or "strongly agree"

   2 respondents replied "neutral/neither agree or disagree"

   1 respondent replied "disagree"

5. I would like more information about Alternative Dispute Resolution training, designations and how it could help in achieving my career aspirations.

   8 respondents replied "agree" or "strongly agree"

The above highlights the importance for our organisation to determine fairly fundamental questions about our strategic vision, services and benefits to our members, and potential revenue streams before meaningfully engaging further on marketing issues.

Subcommittee Recommendations:

- ***Consider diversifying revenue sources beyond designations and membership fees, to open new markets and create new revenue sources, such as stand-alone ADR courses, workshops, and certificates for non-neutrals***

- ***Consider leveraging already existing ADR courses or conferences, or developing new ones, aimed at assisting professionals in other fields to maintain their designations by offering content that qualifies for their continuing education or professional development requirements.***

V. Next Steps

Whether to continue the Subcommittee, and, if so, with what mandate, is an open matter for consideration. Many of the above issues may properly be directed to the MOU Task Force, or to the ADRIC Marketing and Membership Committee, for example, for further consideration. Many boards may want to consider some of the recommendations themselves or at the Presidents' Roundtable.

If the Subcommittee is to continue, it will require a clear mandate and would be assisted by terms of reference including but not limited to its membership structure. For example, should the mandate remain limited to "under 40" neutrals, or should it consider other potential revenue sources and develop those ideas?

Ideally, representatives from all the affiliates, and individuals from corporate members and other interested member categories (such as students), will be invited to participate. Several individuals from across the country have already expressed an interest in becoming involved in the Subcommittee if it continues.

A clear mandate will assist in avoiding the overlap with other committees, discussed above, and focusing the Subcommittee on specific tasks.

Ms. Maniago welcomes the opportunity to discuss this Report with the ADRIC Board in October.

Membership Categories – Across Canada 2014-2017

Full Member

Membership Category: Full Member	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definitions	Benefits (As Outlined in your Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI	2014 -$200 2015 - $200 2016 - $200	2014 -$86 2015- $88 2016- $89 TBC	A person who meets all of the Institute's requirements for education, training and practical experience for placement on a roster. A Full Member has all the rights and privileges of membership, including the right to vote and hold elective office.			
ADRIA	2014 - $199 2015 - $197 2016 -$206 2017 - $206 There is also a $50 admin fee for NEW members (although this is often waived as a marketing or promotional opportunity)	2014 -$86 2015- $88 2016- $89 2017 - $89	An individual whose professional practice, interests or aspirations embrace, support, and/or benefit from the provision of ADR services in Alberta. Full membership includes membership in ADRIC and full voting rights, and is required for those holding professional ADR designations and/or participating on ADRIA rosters. Full members are NOT required to have ADR qualifications, experience or an active ADR practice.	*Summarized:* - enhanced profile and credibility; access to national designations, discounted events; directory listing option for those with designations; job board notifications; ADRIA newsletters and communications; select & appoint opportunities, roster opportunities; instructor/coach rosters; use of ADRIA logo; voting rights; volunteer and Board opportunities; professional development opportunities including advanced training, conferences, leaning events, luncheon speakers, online forums and networking events, etc.	Full ADRIA members are Alberta residents unless there are confirmed, written reasons submitted with the application (eg out-of-country, no other ADRI Affiliate, active practice in Alberta, serving on an ADRIA roster, conflict of interest, interpersonal conflict, etc). Members of other ADRI Affiliates are welcome to take ADRIA training without purchasing an ADRIA membership. Out-of-province applicants are also welcome to join ADRIA as Associate members, including those who are Affiliate members in other provinces.	Updated for 2017
ADRSK	2014 - $100 2015 - $100 2016 - $100	2014 -$86 2015- $88 2016- $89 TBC	*Approved by the ADRSK Board & AGM - Spring 2014:* Persons who have successfully completed an Institute-approved 40-hour course in arbitration or mediation (or an equivalent arising from experience in arbitration, mediation or alternate dispute resolution in Canada) and have their residence or maintain an active ADR practice in the Province of Saskatchewan. Persons holding this level of membership shall have voting rights.	Affiliation to ADRISK & ADRIC + voting rights	Must have their residence in, or maintain an active ADR practice in, the Province of Saskatchewan.	
ADRIM	2014 - None 2015 - $100 2016 - $101	2014 ($43 cap) 2015- $88 2016 -89				
ADRIO	2014 - $184 2015 - $195 2016 - $196	2014 -$86 2015- $88 2016- $89 TBC	Full membership is open to any person engaged in practicing in the area of arbitration, mediation or alternate dispute resolution who is of good character and reputation, and can satisfy the ADRIO Membership Committee that he or she has obtained and maintained standards of academic achievement (have successfully completed an Institute-approved 40-hour course in arbitration or mediation or have equivalent expertise arising from experience in the area of arbitration, mediation or alternate dispute resolution in Canada) and professional experience consistent with the aims and objectives of ADRIO.	- Free Specialty Interest Section Meetings ; Special discounts on a wide range of professional development opportunities; - Access to the ADRIO Members logo; Use of a polished, customizable PowerPoint presentation; Electronic delivery of our newsletter, *ADR Update*; Roster calls and work opportunities circulated only to members; Notices of jobs and unique work opportunities circulated only to members.		Voting Privileges.
IMAQ **(A)**	2014 - $219 2015 - $219 2016 - $255	2014 -$86 2015- $88 2016- $89 TBC	A professional practitioner (mediator and/or arbitrator)	IMAQ professional designation : "certified mediator" and/or "certified arbitrator"; Enhanced credibility; IMAQ Reference services listing (website); Discounted events; IMAQ newsletters; Board and Committee opportunities; Roster opportunities ; Use of IMAQ logo; Voting rights; Networking ; Access to national designations.	Must have their residence in, or maintain an active ADR practice in, the Province of Quebec	
IMAQ	2014 - *$274 /**$1,044 2015 - *$274 /**$1,044		Individual Member working in an organization which he is the	Same as Full Member.	Same as Full member	

Membership Category: Full Member	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definitions	Benefits (As Outlined in your Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
(B)	2016 - *$274 /**$1,044		sole to offer arbitration and/or mediation services (full member): *50 employees or less / **More than 50 employees A professional practitioner (mediator and/or arbitrator).			
ADRAI	Because of different tax rates in various provinces: **2014** Total fee is 196.15 NS: 97.25 NB: 98.97 NL: 98.97 PE: 98.11 **2015** NS: NB: NL: PE: **2016** **Total fee for 2016 will be $200 (ADRIC plus Atlantic)** ADRIC portion is paid from total of $200 and the balance is the Atlantic fee. There are different provincial HST rates. The amount paid for local fees will be an average of $98.54		Any practitioner of ADR.	- Can apply for accreditation as a C.Med., C.Arb., Q.Med., or Q.Arb; Special rates on professional development and educational workshops; Connect with other ADR practitioners in the region; Access to members only area of website; Contact information, including certifications and area of specialty, are listed on website for the general public to search; Plus benefits of National Membership.		Pro-rated fee for partial year is under review.

Associate Member

Membership Category: Associate Member or Patron	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definitions	Benefits (As Outlined in Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI	2014 - $110 2015 - $110 2016 - $110	none	A person, or organization/corporation represented by a nominee, that has an interest in ADR/Participatory Justice but does not meet the qualifications for placement on a roster.	An Associate Member has all the rights and privileges of membership, including the right to vote and to hold elective office.		
ADRIA	2014 - $125 2015 - $125 2016 - $125 2017 - $125 There is also a $50 admin fee for NEW members (although this is often waived as a marketing or promotional opportunity)	none	*(Primarily for ADRIA learners and those who wish to remain connected to Alberta's ADR community. Those enrolled full time at a post-secondary institution in Alberta will instead want to pursue the less expensive ADRIA LINK membership for the same benefits)* An individual who supports ADRIA objectives and/or is pursuing qualifications as an ADR practitioner through ADRIA, and/or has an ADRI membership through another province but wishes to stay connected to Alberta's ADR community.	Summarized: - access to ADRIA's education - discounted events - ADRIA newsletters - networking - committee opportunities.	Same as Full members (open to out-of-province members).	Updated for 2017.
ADRSK	2014 - $135 2015 - $100 2016 - $100	none	*Approved by the ADRSK Board & AGM - Spring 2014:* Persons supporting the goals and objectives of the Institute and interested in arbitration, mediation, or alternate dispute resolution. These persons are resident in Saskatchewan but are not active in the field nor possess the requisite degree of training and/or experience in ADR. Persons in this category are encouraged to continue their education and progress to the full Member level.	Affiliation to ADRISK.	Must be resident of Saskatchewan.	
ADRIM	n/a	none				
ADRIO	2014 - $110 2015 - $116 2016 - $117	none	Open to all persons of good character and reputation interested in the field but have no training in the area of alternate dispute resolution, or those who have training but are not practicing in the field. Associate Members have access to ADR Canada discounted insurance rates.	- Specialty Interest Section Meetings; Special discounts on a wide range of professional development opportunities;		No voting privileges.
IMAQ Associate member:	**2014:** $112.50 $360 $1,130 $2,230 **2016 :** $150 $360 $1,130 $2,230	none	An individual or organization/corporation, that has an interest in ADR/Participatory Justice but does not qualify for any other class. - Individual Member - Organization - less than 50 employees - Organization - 50 to 100 employees Organization - more than 100 employees	- Discounted events - IMAQ/ newsletter - Networking - Board and Committee opportunities -	N/A	No voting privileges
ADRAI	N/A	N/A	N/A	N/A		N/A

Student Member

Membership Category: Student	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definitions	Benefits (As Outlined in Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI	2014 - $110 2015 - discontinued 2016 - n/a	none				
ADRIA	2016 - $75* 2017 - $75* * the ADRIA LINK membership category is open to more than just students. There is no admin fee.	none	ADRIA LINK memberships are available to those who have fully or temporarily withdrawn from the workforce, either through retirement, personal, family or medical circumstances that preclude meaningful employment or contract income from any sector. **Full-time students in a College, University or training program qualify for a LINK membership,** which includes both ADRIA & ADRIC communications and limited benefits.	Same as the ADRIA Associate membership, but also includes ADRIC communications and limited benefits. Full details, benefits, eligibility and exclusions on the ADRIA website.	Same as Full members (open to out-of-province members).	Updated for 2017.
ADRSK	2014 - $25 2015 - $25 2016 - $25	none	Self-described. *Approved by the ADRSK Board & AGM - Spring 2014:* Persons, within the province of Saskatchewan, who are enrolled in full-time studies at a recognized post-secondary institute (e.g.: SIAST and its affiliated Regional Colleges, the Universities of Regina & Saskatchewan and their Affiliated & Federated Colleges).	Affiliation to ADRISK	Enrolled in full-time studies while resident in Saskatchewan.	
ADRIM	2015 - $50 2016 - $50	none				
ADRIO	2014 - $50 2015 - $53 2016 - $54	none	Open to persons of good character and reputation who are enrolled in full-time studies (i.e., Ph.D., B.A., LL.B.). Student Membership is not available to those involved in part-time studies.	Same as Associate: - Specialty Interest Section Meetings - Special discounts on a wide range of professional development opportunities - Electronic delivery of ADR Update	Enrolled in full-time studies in Ontario.	No voting privileges.
IMAQ	2014 -$82.50 2015 - $82,50 2016 -$95	none	An individual who supports IMAQ objectives and is enrolled at any post-secondary institution.	- Discounted events -IMAQ/ADRIC newsletter --Networking -Board and Committee opportunities -	N/A	No voting privileges
ADRAI	Category is inactive and under review.	none	Must be enrolled in a Certificate Program in Conflict Resolution or in a Law program that includes study in ADR.	- Special rates on professional development and educational workshops; - Connect with other ADR practitioners in the region; - Access to members only area of website;		Category is inactive and under review.

Retired Member

Membership Category: Retired Member	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definition	Benefits (As Outlined in Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI	2014 - $75 2015 - $75 2016 - $75	none	A member who does not engage in the practice of ADR/Participatory Justice for a fee and has given the Institute an undertaking not to engage in such practice.	A Retired Member has all the rights and privileges of membership, including the right to vote and hold elective office.		
ADRIA	2016 - $75* 2017 - $75* * the ADRIA LINK membership category is open to more than just students. There is no admin fee.	none	ADRIA LINK memberships are available to those who have fully or temporarily withdrawn from the workforce, either through retirement, personal, family or medical circumstances that preclude meaningful employment or contract income from any sector. Full-time students in a College, University or training program qualify for a LINK membership, which includes both ADRIA & ADRIC communications and limited benefits.	Same as the ADRIA Associate membership, but also includes ADRIC communications and limited benefits. Full details, benefits, eligibility and exclusions on the ADRIA website.	Same as Full members (open to out-of-province members).	Updated for 2017.
ADRSK	2014 - $40.00 Then N/A (Bylaw revisions eliminated this category in favour of "Non-Practicing".)	none	For Patrons over 65 years of age.	Affiliation to ADRISK.		Membership amendments at Spring '14 AGM will eliminate this category.
ADRIM	n/a					
ADRIO	2014 - $80 2015 - $84 2016 - $85	none	This category is open to those individuals who have been members in good standing of the ADR Institute of Ontario (formerly Arbitration and Mediation Institute of Ontario) for at least five years, who are at least 65 years of age, and retired from their principal occupation.	Same as Associate: - Specialty Interest Section Meetings - Special discounts on a wide range of professional development opportunities - Electronic delivery of *ADR Update*		No voting privileges
IMAQ	N/A	N/A	N/A	N/A		N/A
ADRAI	No fee	No fee	Persons who have been members of ADR Atlantic and will not be practicing ADR due to retirement.	- Connect with other ADR practitioners in the region; - Access to members only area of website;		

Membership Category: Corporate Member	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definitions	Benefits (As Outlined in Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI	2014 - $300 2015 - $300 2016 - $300		A person, or organization/corporation represented by a nominee, that has an interest in ADR/Participatory Justice but does not meet the qualifications for placement on a roster.	An Corporate Member has all the rights and privileges of membership, including the right to vote and to hold elective office.		
ADRIA Organizational memberships	For 2017 $500 - $3000 per year plus GST, depending on sector and/or organizational size.	None* ADRIA organizational memberships are expected to include a complimentary ADRIC Associate Corporate membership OR a discounted ADRIC Sustaining Corporate membership (*$250)	A corporation, firm, company, organization or government body that delivers, supports, encourages and/or accesses ADR/ADRIA services, and/or utilizes the services of ADRIA to undertake ADR initiatives, and/or embraces ADR resolution mechanisms to resolve disputes, and/or has a commitment to demonstrate leadership in the field of ADR and wishes to support the aims and objectives of ADRIA. Employee* access to ADRIA training as an employee and employer benefit is included without any requirement for the purchase of individual memberships. • Includes staff, volunteers and Board members	Summarized: - Recognition as an ADR Champion - Training and membership discounts - Employee/Employer benefit/savings - Featured in ADRIA publications and website - ADRIA newsletters and communications - Annual consultations (ADR, Legal, HR, etc) - Use of ADRIA logo - Access to sponsorship & advertising opportunities - Optional ADRIC affiliation and benefits	N/A, although geared to Alberta-based organizations, and of benefit to national or international organizations that have employees in Alberta.	Updated for 2017: Government, Non-profits and Charities $ 500 1 - 5 employees $ 500 6 - 15 employees $ 800 16 - 25 employees $ 1200 26 - 100 employees $ 2000 101 - 500 employees $ 2500 > 500 employees $ 3000
ADRSK	N/A	N/A	**Group membership purchase**: Offers the Institute opportunities to expand our membership and community of practice. **Available only in the "Full Member" category.** Available to Saskatchewan based group/organization/corporation/institute purchasing 4 or more full memberships on behalf of persons within their staff/team. 25% membership discount. All Full Member criteria apply.	N/A		Membership criteria for Spring '14 AGM specifically eliminated corporate memberships as the focus on membership will be around personal connection and accountability. The group membership discount is simply a pricing mechanism not a membership category.
ADRIM	N/A	N/A				
ADRIO	N/A	N/A	N/A	N/A		N/A
IMAQ Corporate A)	2014: $1,800 (national portion included and remitted by IMAQ to ADRIC) 2015: $1,810 2016 : $1,810 (national portion included and remitted by IMAQ to ADRIC)		Corporate Member with five (5) professionals or less offering mediation and/or arbitration services (full member). A professional practitioner (mediator and/or arbitrator).	Same as Full member.	Same as Full member	
(IMAQ Corporate B)	2014: $2,900 (national portion included and remitted by IMAQ to ADRIC) 2015: $2,920 2016 : $2,920 (national portion included and		Corporate Member with more than five (5) professionals offering mediation and/or arbitration services (full member). A professional practitioner (mediator and/or arbitrator).	Same as Full member.	Same as Full member	

	remitted by IMAQ to ADRIC					
ADRAI	N/A	N/A	N/A	N/A		N/A

Other: Life/Affiliate/Non-Practicing/Group/Past Member/On Approved Leave/Complimentary

Membership Category: Various	Regional Fees excluding ADRIC portion and taxes	National Fees excluding GST	Definition	Benefits (As Outlined in Affiliate Bylaws or Board policies) EXCLUDING ADRIC BENEFITS	Residency Requirements	Other
BCAMI **(Life Member)**	N/C		Life Member. No charge.	A member who has provided, in the opinion of the Board of Directors, distinguished service to the Institute and/or the field of ADR/Participatory Justice. A Life Member has all the rights and privileges of membership, but is exempt from paying membership dues.		
ADRIA LINK memberships (Non-practicing, retired, medical, maternity, full time students)	2016 - $75 2017 - $75 There is no admin fee.	None	ADRIA LINK memberships are available to those who have fully or temporarily withdrawn from the workforce, either through retirement, personal, family or medical circumstances that preclude meaningful employment or contract income from any sector. Full-time students in a College, University or training program qualify for a LINK membership, which includes both ADRIA & ADRIC communications and limited benefits.	Same as the ADRIA Associate membership, but also includes ADRIC communications and limited benefits. Full details, benefits, eligibility and exclusions on the ADRIA website.	Same as Full members (open to out-of-province members).	Updated for 2017.
ADRSK **A: Non-Practicing**	2014 - $40 2015 - $50 2016 - $50		**Non-practicing**: Persons resident in Saskatchewan who have been members in good standing of the Institute for at least three years, who support the goals and objectives of the Institute, and are either retired or otherwise on leave from their ADR practice.		**Non-practicing:** Resident in Saskatchewan.	
ADRIM	N/A					
ADRIO	N/A	N/A	N/A	N/A		N/A
IMAQ (Institutional Mediator)	$200	N/A	Persons (non-certified members) who mainly perform mediation functions within a department, a public or parapublic body or an administrative tribunal, provincial or federal jurisdiction that do not meet the requirements for being certified mediator, or, by meeting these conditions, do not wish to be certified and registered with the IMAQ Reference Service	IMAQ professional designation : "institutional mediator"; Enhanced credibility; Discounted events; IMAQ newsletters; Board and Committee opportunities; Use of IMAQ logo; Voting rights; Networking		N/A
ADRAI **(Other: Past Member)**	No fee	No fee	Persons who have been members of ADR Atlantic and who decide to leave active members.	Listed for free as past members (inactive) for one year after their membership has not been renewed. After one year, their profile will be archived and they will no longer be listed on the website. If the person continues to offer ADR services but declines to maintain membership then ADRAI will archive their profile immediately.		
ADRAI (Other: On Approved Leave)	No fee	No fee	Persons who have been members of ADR Atlantic and will not be practicing ADR for a period of time due to a specific circumstance (i.e. prolonged illness or parental leave).	- Connect with other ADR practitioners in the region; - Access to members only area of website;		
ADRAI (Other: Administrative Complimentary Membership	No fee	No fee	Persons who work with our provide admin support to ADRAI or Board members.	- Connect with other ADR practitioners in the region; - Access to members only area of website;		