

Living Smart Facilitator Policy and Licensing Agreement

Rationale

Be Living Smart Inc. (BLS) and Living Smart (LS) Facilitators (Facilitators) are in an interdependent and mutually supportive relationship. Our facilitators enable Living Smart to grow and flourish and are the public face of the program. The success of our programs is dependent on the quality and professionalism of their delivery and how our Facilitators conduct themselves. The ongoing training and up-skilling of new and existing Facilitators to maintain high standards is important to BLS.

This Policy and Licensing Agreement describes the relationship between BLS and facilitators and the obligations of both parties.

This relationship is underpinned by this Living Smart Facilitator Policy including;

- the listed Facilitator standards for eligibility,
- the terms of agreement the facilitators agree to,
- the details in the “Application to deliver a Living Smart Course” Form,
- the list of minimum evaluation requirements and
- other respective agreement terms and conditions.

This Policy outlines the mutual responsibility of BLS and Facilitators, and the standards that need to be upheld in the delivery of LS courses. Agreement to this policy licences a LS trained Facilitator to deliver the Living Smart community course.

This policy may be reviewed periodically at the discretion of the BLS Board, and will be formally reviewed in 2016.

1. Facilitator Standards:

BLS defines the standard, training, skill requirements and competency level required of the Facilitator to deliver the Living Smart program. BLS requires the Facilitator to comply with the following:

To be a Living Smart Facilitator

- Be on their own Living Smart journey and be willing to share this journey with others;
- AND
- Have completed the LS Community Course. Attendance must be a minimum of 5 out of 7 or 8 sessions and have completed the LS Facilitator Training Course (min 2 day program, including completion of all course presentation requirements) within 24 months of completing the LS Community Course.
- OR
- If a community course is not available, the Facilitator needs to have completed the extended (typically 3 day) Facilitator Training course and have established a mentoring relationship with an experienced and active facilitator.

New and inexperienced facilitators

A newly trained facilitator (i.e. having completed the LS facilitator training requirement outlined above) will be advised by the facilitator trainer on their recommended path ahead to running a course themselves.

Typically a newly trained facilitator inexperienced in facilitation practices and skills, or is new to Living Smart, prior to facilitating their own course will need to:

- Assist experienced LS facilitators in their course (Facilitators who meet the above standards in the eligibility section) in a volunteer capacity setting-up and delivering a course, which would include mentoring by the experienced facilitator, and providing support to deliver some sessions.
- Pending the successful completion of the above and positive feedback from the experienced Facilitator, the new facilitator will be approved to run their own courses. It may be deemed necessary for the new facilitator to have some additional mentoring and support, or co-facilitation with an experienced facilitator when they run their first course. The support of an experienced facilitator is likely to be in a paid capacity so the cost needs to be incorporated into the course quotation as a co-facilitation or mentoring cost.
- Where no local course is running (i.e. for regional or interstate facilitator)s, mentoring sessions via phone or video may be advised pre course start and post weekly sessions.

To stay eligible to facilitate Living Smart courses

A facilitator must:

- have facilitated a Community Course within the previous 18 months. If not, they are required to attend the final day of a Facilitators Training Course within the previous 12 months (including participating in the activities and policy sections), subject to the availability of Facilitator Training Courses.
- be a current financial member of BLS;
- participate as a volunteer promoting LS courses at community events endorsed by BLS at least once in each calendar year.
- be engaged with the BLS Facilitators Network, where one exists in the region, including attending a minimum of 2 meetings annually or at least submit ideas/learnings from a current course, or contribute to the Board Working Groups on an annual basis.

- be willing to share their experiences, any materials and resources developed with other facilitators and on the LS facilitator portal with the principles of a Creative Commons copyright licence. This requires facilitators to acknowledge the person who has created the work/activity used. Presentations and activities from the LS Facilitator resources should only be used in the context of a LS course, unless with permission of the author.
- Be willing to and undertake mentoring of new and in-experienced LS Facilitators.

2. Facilitator Terms of Agreement:

The “Application to Deliver a Living Smart Course” Form forms the agreement between BLS and the Facilitator, and Host to deliver a Living Smart community program and use the Living Smart brand, logo and resources for specific courses. It sets out the responsibilities of the Facilitator and Host to BLS. The Facilitator must abide with the following requirements:

2.a Contacting Potential Hosts

- If you are contacting potential host organisations about a potential LS course, you must notify the BLS Co-ordinator prior to approaching the host. This is to ensure that BLS or another Facilitator is not already in negotiations with that organisation.
- Once a course is agreed with the host, the Application to Deliver a Living Smart Course Form should be completed with the host. At this point it is still the host’s right to determine if they will offer the course directly to that Facilitator; however, it is assumed that in most circumstances the facilitator may have established a relationship with the host and will therefore be offered the facilitation role as per the Preferred Supplier Arrangement outlined in section 3a.

2.b Course Promotion

- The requirement for course advertising is outlined in the Application Form and this needs to be completed and approved prior to any marketing of the course.
- All promotional material must clearly name the course as “Living Smart”, and use the logo as given. The Living Smart website address must be on all material.
- The inclusion of the following acknowledgement clause will be made in media releases, flyers and posters: “*The Living Smart program is now coordinated by Be Living Smart Inc. For more about Living Smart courses see www.livingsmart.org.au ”*
- Although the Facilitator may be contracted or sponsored by a host body, they represent Living Smart in all written and verbal promotions related to the course. If the Facilitator runs a business related to sustainability they should advertise the course as “brought to you by Living Smart, sponsored by _____(relevant sponsor(s), and facilitated by _____(Facilitator name) from _____(business name)
- In the final course report, the following acknowledgement clause will be included: “*Living Smart was developed by the City of Fremantle, Murdoch University and Southern Metropolitan Regional Council.*”

2,c Course Requirements

- Course size to be minimum 15 and a maximum 40 enrolled participants.
- All ten Living Smart topics are covered.
- There is in-class time for goal setting during each session.
- There is sharing of goal setting and/or actions taken each session.
- There is some process for the setting of end of course goals setting and/or visioning process.
- There is at least one field trip in each course.
- A “mid-week” email will be sent to participants.
- Following best practise principles of adult learning, as a minimum there is group discussion and activities in each session.
- The minimum evaluation components will be completed. These are the current pre-course form, some brainstorming activities where participants list achievements and plans in each Living Smart area and the post-course form.
- A basic course report including results of all evaluations will be completed and a copy given to BLS, based on the pro-forma provided within a month of the course finishing.
- A full list of participants and their contact details and permissions will be given to BLS within a month of the course finishing.

Note: If a Facilitator is interested in creating a Living Smart program or activity other than a community-based program, permission must be granted by the Be Living Smart Board for the delivery model and an appropriate evaluation process be determined.

2.d Financial Requirements

Most courses will be run for a charge to the host (host fee) and a separate fee charged to each participant (participant fees). The participant fees and host fee are pooled and shared proportionately between BLS and facilitator. The amount to be shared between BLS and the facilitator is calculated on a sliding scale, depending on the level of the host fee, as outlined in the example below which is based on courses with 20 participants.

Facilitator Course Quote to Host (ex-GST)		\$3,000	\$4,000	\$5,000	\$6,000
Revenue Streams	Host fee ('Quote')	\$3,000	\$4,000	\$5,000	\$6,000
	Participants' fees for 20ple*	\$1,455	\$1,455	\$1,455	\$1,455
	Total fees	\$4,455	\$5,455	\$6,455	\$7,455
Revenue Split	Facilitator : BLS % split	55:45	60:40	65:35	70:30
Income	Facilitator revenue	\$2,450	\$3,273	\$4,196	\$5,219
	BLS revenue	\$2,005	\$2,182	\$2,259	\$2,237

* Participant fee at \$80 less GST

Under this revenue-sharing arrangement, facilitator income will be vary with enrolment numbers. The following example shows the effect of participant numbers on the final income for the facilitator:

A course was quoted at \$5000 (ex GST) to the Host. The facilitator and host ran an effective marketing campaign and 35 people enrolled.

The participant fee revenue stream totalled \$2,800 incl GST, \$2,545 ex GST.

The total fees are \$7,545 and the revenue split is 65:35%.

The facilitator income is \$4,905 (ex GST) compared to \$4,196 for 20 people in the table above.

The BLS share of the host fee is payable by the facilitator to BLS. An invoice will be provided to you for this proportion minus the participant fee share (to minimise invoicing) and payment to BLS is to be made within four weeks of the end of the course. Payment should be made by the online payment system wherever possible.

A \$80 (including GST) Living Smart Membership and Course fee per participant will be charged and be payable to BLS. It is preferred that participants use the online BLS payment facility, however if this is not possible the collection and banking of this fee will occur within 3 weeks of the course starting. A 50% concession is available for health care or pension card holders. This is a one-off payment for the course and then membership is \$40 annually in subsequent years. BLS will pay the facilitator their share of the participant fees via the invoice for the host fee (as mentioned above).

3. Be Living Smart Inc. Course Bidding process:

Below are the options that BLS will use to nominate facilitators to run Living Smart courses, in most instances the EOI process will be used.

3.a Expressions of Interest

When a host organisation approaches BLS to deliver a Living Smart course, BLS will in most circumstances circulate an EOI to all Facilitators. The EOI will always require a Facilitator to adhere to and meet the Facilitators Standards in this policy and licensing agreement.

3.b Preferred Supplier

Some host organisations may have a preferred supplier. This could be someone who made an initial contact and established a relationship with the host and organised the course as per Section One Facilitator Standards, or someone the host organisation has used on an ongoing basis and has a proven track record of delivering successful courses. A host organisation has the right to select a Facilitator without an EOI process should they wish. This will require prior agreement from BLS.

3.c Direct Appointment by BLS

In some circumstances BLS may pre-select a Facilitator to facilitate a particular course. This would generally when BLS has a new host organisation and wanting to establish on-going courses with that organisation or where there are special needs to be met.

4. Be Living Smart Inc. Terms of Agreement:

BLS agrees to provide to the Facilitator the following (as a minimum):

- Professional development in the form of a two or three day Facilitator Training Course available at a reasonable cost.
- Resources to market and deliver the LS programs/courses, including:
 - o Templates for posters and media releases and advice regarding promotion of courses
 - o Facilitator Guides, Action Guides and support documents
 - o Examples of presentations for each topic, including power point templates
 - o Creation and upkeep of an online site to allow the sharing of new ideas and suggestions
- Mentoring by experienced and active Facilitators, via a “Currently Facilitating Email List”.
- Provision of LS Facilitator Network with at least four meetings held annually.
- Support to access potential course hosts and participants.
- Insurance – all licensed Living Smart Facilitators delivering a course in a voluntary capacity will be covered under BLS’s Voluntary Workers Insurance Policy. Facilitators being paid for their services are responsible for their own workers compensation and other insurances as they are not covered by BLS

5. Addressing Grievances or issues related to this Policy

BLS and the Facilitator agree to abide by the above standards and terms of agreement.

BLS is obliged to fulfil the Terms of Agreement as described. Should a Facilitator have any grievance or issues associated with the fulfilment of these terms, these should be forwarded in writing to the BLS Board either directly via any Board Member or indirectly via the BLS Coordinator. BLS undertakes to consider and address the grievance or issue within one month of receiving such notification.

The Facilitator is obliged to fulfil the Terms of Agreement as described. Should BLS be aware of any complaints, issues or concerns relating to the Facilitator's conduct in meeting the terms of agreement, they will be contacted and formally notified by the BLS Facilitators Board Representative or BLS Board Convener.

If deemed necessary, the Facilitator will be required to address these concerns to the BLS Board in writing. Should the BLS Board determine there has been any serious breach of the terms of agreement, the Facilitator will be notified and will be required to address the breach(es) immediately. If the breach(es) are not resolved and/or continue, the BLS Board reserves the right to revoke the Facilitator's license. If appropriate, the BLS Facilitators' Network will be consulted on and advised of such determinations.