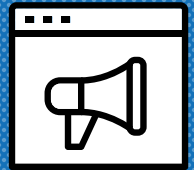
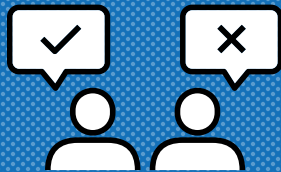


STEWARD WARD D

HANDBOOK



FUNDAMENTALS



Steward Fundamentals is a two-day foundation-level course for all stewards. It focuses on the essential skills every steward needs to know. Through discussion and interactive group activities, you will be introduced to the key roles and responsibilities of a steward as advocate, educator, organizer and communicator.



Table of contents

Welcome.....	3
BCGEU Areas	4
BCGEU Structure	5
Your Rights and Responsibilities as a Steward.....	7
The Duty of Fair Representation.....	8
Getting Started as a Steward.....	9
Getting to Know Your Collective Agreement.....	10
Building Trust and Relationships	11
How to Be a Good Listener.....	12
Welcoming & Orienting New Members.....	13
Engaging Members	14
Grievance Basics.....	15
Work Now, Grieve Later.....	16
Life Cycle of a Grievance.....	17
Checklist: Grievance Preparation.....	18
Checklist: Preparing to Meet with Management.....	19
Grievance Fact Finding	20
Interviewing a Member About a Grievance.....	21
How to Fill Out a Grievance Form	22
Grievance Meetings	24
Dealing Effectively with Management	26
Privacy and Confidentiality.....	27
Handling a Discipline Grievance	28
Mitigating Factors.....	29
Progressive Discipline.....	30
Leading Cases	31
Bullying and Harassment in the Workplace.....	33
Joint Committees.....	34
House Meetings	35
How to Create a Membership List	37
How to Organize a Workplace Meeting.....	39
Letters of Expectation.....	40
Example of a Letter of Expectation	41
Map Your Workplace	42
Mental Health and Work.....	43
Putting Grievances into the Bigger Picture	44
Social Media and Work.....	45
Steward FAQ	46



Welcome

Thank you for stepping up into the role of steward! You have embarked on a path that will prove to be rewarding and meaningful. Stewards are the foundation of our union. You are our presence in the workplace, standing with our members to defend our collective agreements and advance our rights. Stewards build solidarity among workers and thus build a strong, effective and relevant union.

As a steward, you will face challenges, but will also be supported by education and mentoring to learn, grow and develop your skills and understanding. The steward's role has become more complex as the world of work changes. We have witnessed the terrible effects of the neoliberal experiment on public services and work, the toll of government-imposed austerity, and the corporate concentration of media over the past decades. All of this has had a drastic impact on society and our members, and the environment in which unions organize.

We both began our involvement in the BCGEU as stewards, and we know that, like us, you will find the experience enriching.



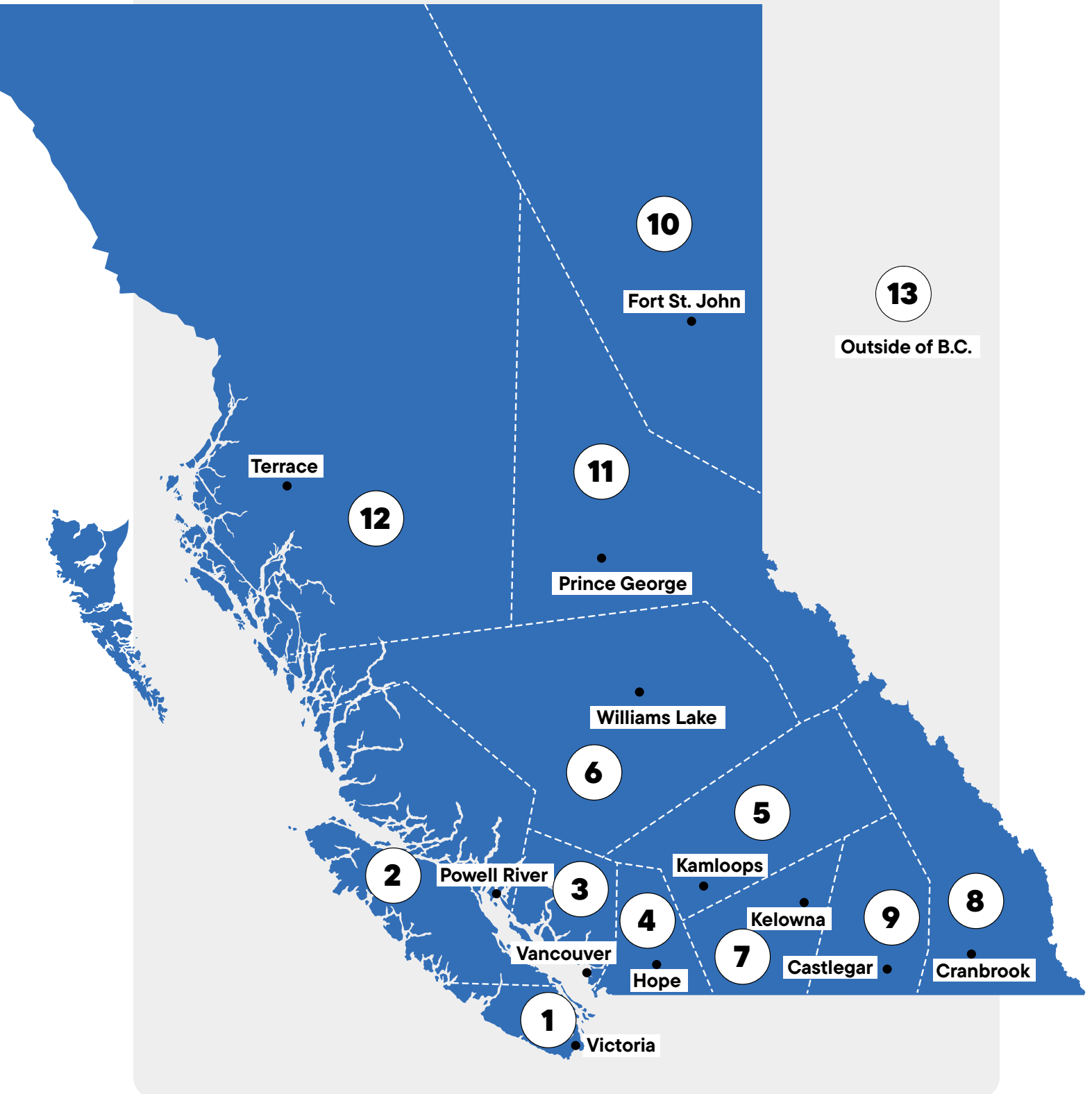
Paul Finch
BCGEU President



Maria Middlemiss
BCGEU Treasurer



BCGEU areas





BCGEU structure



The BCGEU is one of Canada's most diverse unions, representing over 90,000 members throughout B.C. in a wide range of sectors, including the provincial public service (government), the broader public sector — such as health care, community-based social services and education — as well as the private sector. The BC Ferry and Marine Workers' Union (BCFMWU), Compensation Employees' Union (CEU) and Interior Brewery Workers' Union (IBWU) are affiliated to the BCGEU.

1 Corrections and Sheriff Services

Safeguarding British Columbians' safety and security at provincial correctional centres and courthouses.

3 Community Social Services

Supporting children, youth, families, and individuals in inclusive community-based social services and child care.

4 Health Services

Supporting seniors, people with physical disabilities, mental illness and addictions in care facilities, and providing health sciences and public health services.

5 Retail Stores and Warehouse

Distributing and retailing liquor and cannabis responsibly while generating revenue to support quality public services.

6 Social, Information and Health

Providing a range of technical, social, cultural, educational, information technology, research, policy, health care delivery and associated support functions.

7 Education, Scientific, Technical and Administrative

Teaching and supporting students and providing library, technical and legal services.

8 Community Health Services

Providing community-based supports and services for seniors, people with physical disabilities, mental illness & addictions.

10 Operational Services

Maintaining our highways and bridges, operating inland ferries and the Canada Line, and staffing tree nurseries.

12 Administrative Professionals

Providing essential administrative and support services in provincial government ministries, authorities and other entities.

14 Indigenous Services

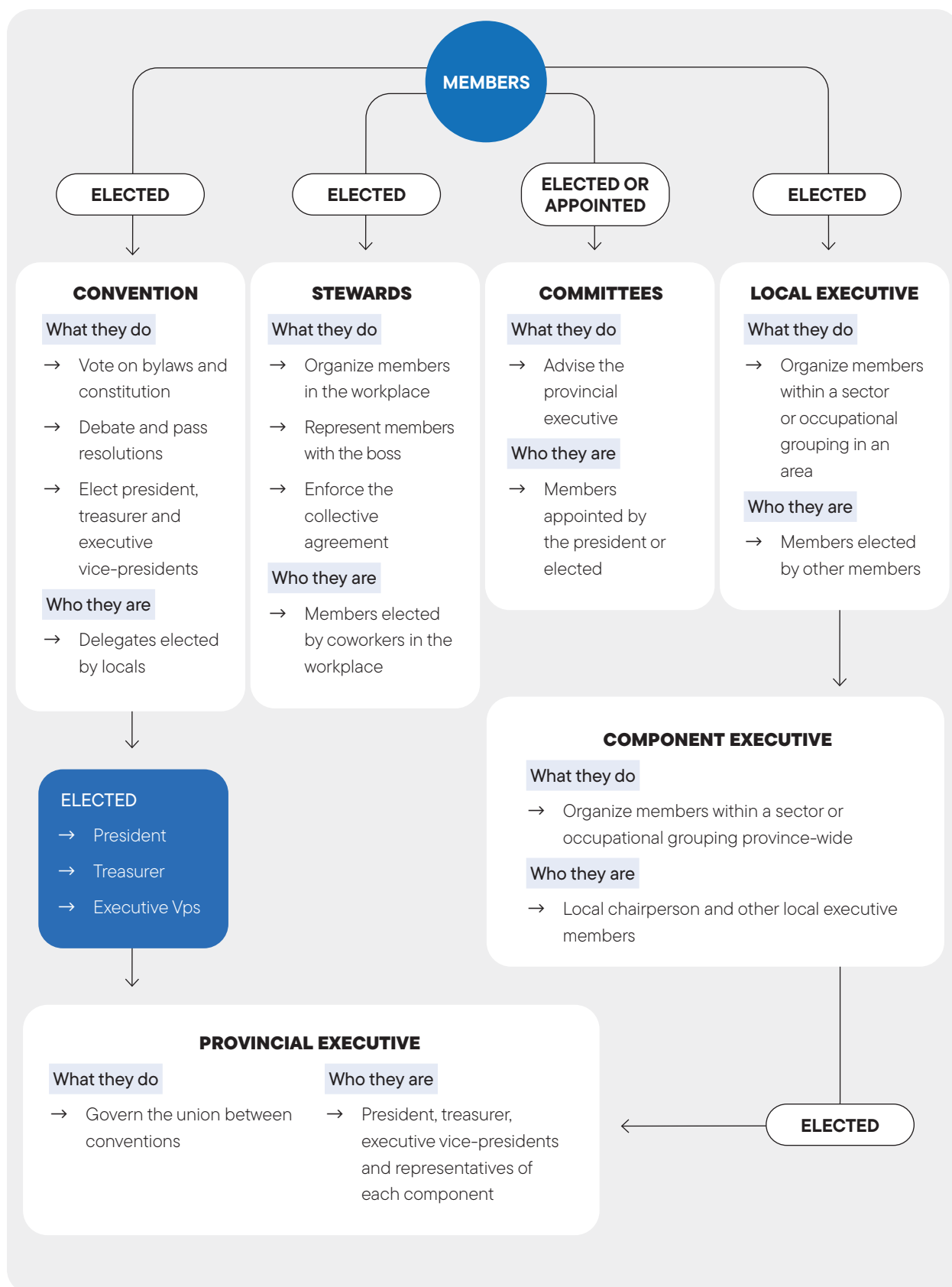
This new component includes employers that exist primarily to serve Indigenous populations.

17 General Services

Working in local governments, hotels and casinos, credit unions, the BC Housing Management Commission, and at BC Place in Vancouver.

20 Environmental, Technical and Operational

Protecting and regulating B.C.'s natural resources, infrastructure and environment.





Your rights and responsibilities as a steward

Your rights

The rights of a steward are recognized in labour law, and as a steward, you are a critical part of the labour relations system. The rights and responsibilities of stewards are also outlined, in part, in your collective agreement, but all stewards have fundamental rights to:

- File a grievance, advance it through steps in the process, and have management respond to it
- Investigate and interview members about grievances and other workplace issues
- Represent members in meetings with the employer
- Talk with members about their concerns and issues
- Participate in union activities, elections and learning opportunities

You may also, depending on your collective agreement, have the right to:

- Conduct some union work on the employer's time
- Hold membership meetings in the workplace
- Conduct balloting for local executive elections, strike and ratification votes

Your responsibilities

Your key responsibilities as a steward are to:

- Advise and represent members
- Communicate, inform and listen
- Find practical solutions for problems
- Build the union in your workplace
- Treat all members fairly and with respect





The duty of fair representation

The union has a legal obligation to represent members in a manner that is not “*arbitrary, discriminatory or in bad faith*” pursuant to Section 12 of the *BC Labour Relations Code*. This is known as the Duty of Fair Representation (DFR). If a member feels that they have been treated unfairly by the union, they can file a Section 12 complaint through the BC Labour Relations Board. The DFR extends to all workers in the bargaining unit who pay dues, including those who have not signed a membership card. As a shop steward, you are a representative of your union at the workplace; so, this duty extends to you as well. A substantiated Section 12 complaint can have significant consequences, including impacting the union’s reputation. It is important that this duty is upheld.

Arbitrary conduct means acting on opinion or bias rather than on facts. It could also mean a reckless disregard of an individual’s interests.

Discriminatory conduct happens when members receive unequal treatment that violates the protected grounds outlined in the *BC Human Rights Code*. This includes but is not limited to age, gender, sexual orientation, indigenous identity, mental or physical disability, or race. This can also mean playing favourites resulting in inequality in how members are treated and represented.

Bad Faith conduct means being intentionally misleading, dishonest, or knowingly negligent. This could include decisions influenced by personal hostility, revenge, or dishonesty.

Representing members fairly

- When a member comes to you with a problem, be open-minded, and treat them with fairness and respect.
- Members have a right to file a grievance, even if you don’t think it is viable. You can provide advice but never dismiss a concern or complaint. If a worker chooses to file a grievance, support and assist them. Stewards cannot refuse to file a grievance or withdraw one. The staff representative will assess for merit.

- Don’t accept the employer’s interpretation of the grievance and always give the worker the opportunity to respond to the employer’s description of things.
- Use the 6 W’s to guide your fact-finding.
- Never discriminate against a worker on any grounds prohibited by the *BC Human Rights Code*.
- Never act dishonestly or out of ill will, such as personal dislike or revenge.
- If you find yourself unable to deal with a member impartially, then refer them to another steward.
- The union has checks and balances in place to accurately assess the merits of grievances. Some grievances may be turned down after careful review by a staff representative because they are unlikely to succeed at arbitration. The worker has the right to appeal this decision through the union’s internal grievance appeal process.

Follow this link or scan this code to watch a video on the Duty of Fair Representation:
<https://youtu.be/sBoKGoVRIAo>



Article 7 – BCGEU Constitution

The BCGEU Constitution also requires that members/stewards uphold the Duty of Fair Representation. Members can file a complaint and members/stewards can be charged for breach of duty based on the grounds prescribed under Article 7 – Discipline of the BCGEU Constitution. In contrast with a Section 12 complaint, an Article 7 complaint is the union’s internal complaint process.

As an activist you have a duty to be faithful to the BCGEU’s Constitution and bylaws and a responsibility under Article 7. The Provincial Executive (PE) or a hearing panel made up of at least three members of the PE can penalize a member for breach of duty.



Getting started as a steward

Establish yourself and your credibility

- Make a point of introducing yourself to all the members you represent.
- Make an effort to reach out to members from equity groups, such as Indigenous and racialized workers, workers with disabilities, 2SLGBTQ+ workers, and workers whose first language isn't English.
- Tidy up the union bulletin board, post any new posters and your contact information.
- Advise the supervisors and managers that you are a new steward.
- Get in touch with your local chairperson to find out about upcoming meetings.
- Plan for longer, one-to-one and small group conversations with members who have influence in the workplace.
- Wear your steward pin at work.
- If there are stewards from other locals – or other unions – in your workplace, get to know them and keep in touch.

Get up to speed

- Talk to other stewards and activists to learn about the issues, bargaining, and grievance history of your workplace.
- Draw up a map of your workplace to identify where members work, key gathering points and how information flows.
- Request a list of all members in the workplace and their contact information from the union.
- Review the employers' policies.

Do some homework

- Review your collective agreement, especially these articles:
 - Purpose of the agreement
 - Rights and responsibilities of stewards
 - Grievance procedure.
- Review the minutes of recent joint labour/management or Article 29 committee and health and safety committee meetings.

Resources you will need

- Call your area office to register for our STEP UP! and Steward Fundamentals courses or do it online at learning.bcgeu.ca.
- Sign onto my.bcgeu.ca and visit the steward resources page, find out about events and get news about bargaining.
- Contact your area office for a membership list, contact information for your local executive, grievance forms, copies of the collective agreement, membership cards and other supplies.





Getting to know your collective agreement

Your collective agreement or contract is the legal document outlining the terms and conditions of employees in the bargaining unit, like pay, benefits, entitlements and leaves. It has been negotiated between the union, as the bargaining agent for employees, and the employer.

A collective agreement might cover one small workplace, many employees with multiple employers in a sector, or a bargaining unit as large as the provincial government. Sometimes employers and unions are part of larger associations which bargain sectoral agreements on their behalf. Large agreements covering the public service or entire sectors may have subsidiary component or local agreements as well.

Tips for understanding your collective agreement:

- Familiarize yourself with the table of contents.
- Look for specific definitions of words and terms, often found at the beginning of the agreement.
- If there is no specific definition of a word or term, the ordinary meaning applies.
- “May” means something is optional, often at the discretion of the employer.
- “Shall”, “must” and “will” are mandatory.
- “And” means both or all, and “or” means either.
- Review the grievance procedure, especially the timelines.
- The collective agreement may also include other procedures, including classification appeals, harassment complaints, and processes for dealing with workload or hours-of-work.
- The collective agreement takes precedence over the employer’s policies and procedures if there is a difference between them.

- The Public Service Act also regulates labour relations in the provincial public service and other provincial acts regulate labour relations, particularly negotiations, in the community social services, community health, health facilities, and education sectors.
- All workplaces must comply with the *Labour Relations Code*, the *Human Rights Code*, the *Workers’ Compensation Act* and the *Occupational Health and Safety Regulation*.

It’s helpful to have a guide to follow when reading collective agreement articles. These four steps will help you to make sense of the language you’re reading. Read Article 2.1 Recognition and Rights of Stewards in the Dogwood Manor collective agreement and use it to answer the four questions below.

- What right(s) does this article/language establish?
- Whose right(s) are they?
 - Employees?
 - Employer?
 - Union/steward?
- What conditions, if any, must be met for the right(s) to come into effect? - By the employer? - By the employee/union?
- What else? What other resources might lend additional support? (other articles, other support documents, employer policies, OHS, etc.)



Building trust and relationships

An effective steward is a leader who is trusted. Trust is built over time by developing mutually respectful relationships, including with people we may not see eye-to-eye with – like the boss. Aim to build relationships and trust with your members, other stewards and union leaders, your staff representative and even the boss.

With members

- Don't gossip
- Treat every member with respect and fairness
- Respect privacy and maintain confidentiality
- Be fair and open-minded always
- Don't take sides in conflicts between members
- Avoid becoming part of a clique at work

With other stewards and union leaders

- Share your knowledge and mentor others
- Always be open to learning
- Consult, establish regular communication and check-ins
- Sometimes, you will need to agree to disagree
- Think of yourselves as a team
- Make regular reports to your local

With your union staff representative

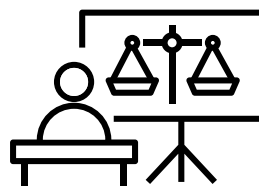
- Understand the staff representative's role
- Consult and ask for help when you need it
- Keep them informed about emerging issues and problems you've identified
- Sometimes you will need to agree to disagree

With the employer

- Know your facts before you speak
- Earn the boss's respect by acting with civility, authority and confidence
- Act with authority and confidence: when you are acting as a steward, you are on an equal footing with the employer's representatives
- Pick and choose your battles
- Don't make it personal
- When they go low, you go high
- Sometimes you will need to agree to disagree
- Keep in mind that some supervisors are also members of the union

See these other tip sheets:

- How to be a good listener (p. 12)
- Grievance meetings:
Going in and staying grounded (p. 24)
- Dealing effectively with management (p. 26)



Earn respect by acting fairly,
with honesty and integrity.



How to be a good listener

Listening is one of the most important skills for a steward to have. It builds trust and develops strong relationships but also aids a steward in focusing on the real concerns of members. This is particularly true when a member is distressed or facing challenges.

People like to know they are being heard and understood! Developing strong and effective communications skills like listening will help you be a successful steward and workplace leader.

Tips on being a good listener

- **Generally, use the 80/20 rule:** you should be listening 80 per cent of the time and speaking only 20 per cent of the time.
- **Avoid distractions:** put your phone away, look at the other person.
- **Slow down:** our brains process thoughts four times faster than spoken words. It's easy to skip ahead in a conversation, using your assumptions to fill in the gaps and plan your response. Resist this urge and focus on what the other person is saying.
- **Don't interrupt:** be patient and take the time to hear the full story.
- **Keep an open mind:** don't assume you already know what someone cares about. People will surprise you.
- **Don't fish:** avoid leading questions like "Don't you agree that...".
- **Show that you hear what they're saying:** react, ask follow-up questions, and repeat back what you understood. If you don't understand, ask.
- **Listen to learn:** find common ground. You don't have to agree with every point, but look for areas of agreement, and acknowledge where you differ.
- **Don't feel you need to sell something or convince the other person:** a steward is not a salesperson.
- You're genuinely looking to learn the other person's point of view and create something new together.



Welcoming & orienting new members

An essential task for stewards is to welcome and orient new members.

When the employer hires a new employee into the bargaining unit, you will have an opportunity to do this.

It is laid out in your collective agreement but generally, you have at least fifteen minutes on the employer's time to conduct an introduction and orientation. It may be the very first experience a new member has with the BCGEU or possibly any union. Your job is to make the member feel welcome, understand their rights and collective agreement, and the benefits of belonging to the BCGEU.

The employer should advise you of any newly hired employees, but this doesn't always happen. Try to establish a protocol with your supervisor to get regular notice of new hires. In some large workplaces, employers conduct intakes of groups of new employees. You can ask to be part of this agenda to lead orientations to larger groups. However, managers and supervisors who are not members should not be in the room for this part of the session. And, although this seems practical, it does reduce the time you have to spend with each new employee.

Make your primary goal of the orientation to establish some trust with the new member. You will do this by outlining your role, offering support and encouragement and, most importantly, listening. There is lots of information to share but don't overwhelm the new employee. Help them fill out an online membership application.

Make sure to thank them for their time and remind them where they can reach you. Follow up with the member in the following weeks to see if they have any questions or concerns – let them know you are always available to help.

Once you have had an informal chat, use this checklist to share the following information (but not necessarily all at once!):

- Share the BCGEU structure video on the BCGEU YouTube channel.
- Names and work locations of all stewards and health and safety representatives in the workplace.
- Highlight essential elements of the collective agreement (wage grid, benefit and vacation entitlement, probationary period, hours of work, holiday and overtime pay, etc.).
- When negotiations for the next collective agreement are set to start.
- An introductory package will be mailed to them shortly with a copy of the collective agreement and additional information about the union.
- Members can find and download their collective agreement onto a computer, tablet or smartphone from the website. The My BCGEU website is customized to provide relevant information about events, including workshops and meetings, news and bargaining information, scholarships and special offers like discount programs.
- Keep your contact information up to date using the website.
- The local, who its members are and where they work.
- Union dues are currently 1.85 per cent of gross pay, and this is a credit for income tax purposes. All employees in the bargaining unit pay dues whether or not they sign a membership card.
- Help them to complete the online membership application at <https://my.bcgau.ca/signup>.

Completing the online membership application card is important!

It allows for better engagement with the union on any union business including voting during bargaining and union elections and to have a leave of absence issued to attend union events or training.





Engaging members

We tend to measure member engagement by turn-out for meetings and votes and how many activists we have. But that's like not seeing the forest for the trees. The challenge of engagement is to connect with members authentically on issues they care about and the values we share. This means we need to rethink how we engage.

Our busy, competitive and technology-driven world has created a crisis of social isolation for people, weakening many of the institutions and places that used to connect us to one another. People need and want to connect, and work is one place where that possibility exists.

You can thoughtfully approach member engagement with a simple plan: Go, Listen, Build.

Go

Go to where members are. This is both literal and metaphorical. You need to find where members congregate, where they socialize, before and after work. But you also need to appreciate where members are at any given point in their lives. What's on their minds? What are their pressures? It often isn't just about work. You also need to understand members' values.



Every conversation you have with members teaches them about the union, about who we are, and what we stand for.

Listen

Listening is how you will come to understand what members feel and care about.

Build

Start small but connect members with union campaigns and initiatives on the issues they care about. Draw attention to the union's principles and values. Offer members opportunities to learn more and get involved.

Stewards play a central role in building a welcoming, inclusive and connected workplace and local. Member engagement is an essential piece of the steward's job and builds worker power. Our goal is for more members to think of the union as their union — as an organization they are proud to be part of, as a place where they feel a sense of belonging, and as a group that shares similar values and that acts to protect the interests of its members and the broader community.

How NOT to engage members

Avoid these three tactics that won't work and are likely to turn members off:

- Overwhelming people with an avalanche of facts and figures.
- Telling people what to think or pointing out how they're wrong to think what they do.
- Developing a campaign, project or plan that isn't related to members' actual needs.

See these other tip sheets:

- How to be a good listener (p. 12)
- Building trust and relationships (p. 11)



Grievance basics

What is a grievance?

Simply, it's a process aimed at addressing an infringement of the employee's collective agreement rights.

Almost all grievances concern a breach of a specific provision covered in a collective agreement. If you think your employer has breached your collective agreement rights, you are entitled to file a grievance. You should be able to identify specific articles of the collective agreement you believe have been breached.

Check your collective agreement for information about the grievance process and its timelines.

The grievance form will include these key facts:

- **WHO:** Who is involved? The member's name, employer title and job classification. Name and title of supervisors or witnesses.
- **WHAT:** the story of what occurred in chronological order.
- **WHEN:** When did the breach occur? Dates and times.
- **WHERE:** Where did it occur? Exact location(s). Pictures or drawings are helpful.
- **WHY:** Why is this considered to be a grievance? A violation of an article(s) in the collective agreement, an Act or Code, such as the *Human Rights Code*?
- **WANT:** What does the grievor want as a remedy? What you expect the grievance settlement to look like. For example, vacation time returned, return of all wages lost.

Types of grievances

A steward can classify grievances according to where they come from and how they arise. Grievances are also classified according to who is affected.

- **Individual grievance** – Used when the subject matter of the grievance is personal to an individual. Discipline is grieved by using an individual grievance. Most grievances are individual grievances.
- **Group grievance** – Used when a group of workers join in filing their grievances. For example, where everyone on a shift was not paid overtime. In that situation, instead of everyone on the shift filing separate individual grievances, a group grievance can be filed. All individuals affected by a group grievance must be named to ensure that each member receives a remedy if the grievance is settled in their favour. A group grievance is sometimes called an *et al* – meaning “and others” – grievance.
- **Policy grievance** – Used when the subject matter of the grievance is of general interest and where the individual employee may or may not be affected at the time the grievance is filed. Criteria includes many people affected, a large number of alleged violations. The remedy is for more than one individual and is often in the form of a declaration.
- **Union grievance** – A combination of a policy grievance and individual grievance. Although one individual may be affected, he or she may be affected in a way that is a concern to all members of the bargaining unit.

See other tip sheet:

- Grievance fact-finding (p. 20)



Work now, grieve later

Work now, grieve later, is a basic and long-standing rule in labour relations. All union members must understand and follow this rule in order to avoid discipline for insubordination. Insubordination is a deliberate refusal to do work as directed by your supervisor or manager. The rationale for this rule is that the employer has a need to be able to control and direct its operations uninterrupted. They have the right to manage the workplace and direct your work.

The work now, grieve later rule is about doing the work as directed and later exercising your right to file a grievance if a worker takes issue with an employer's order.

This rule is not unlimited!

There are two main exceptions:

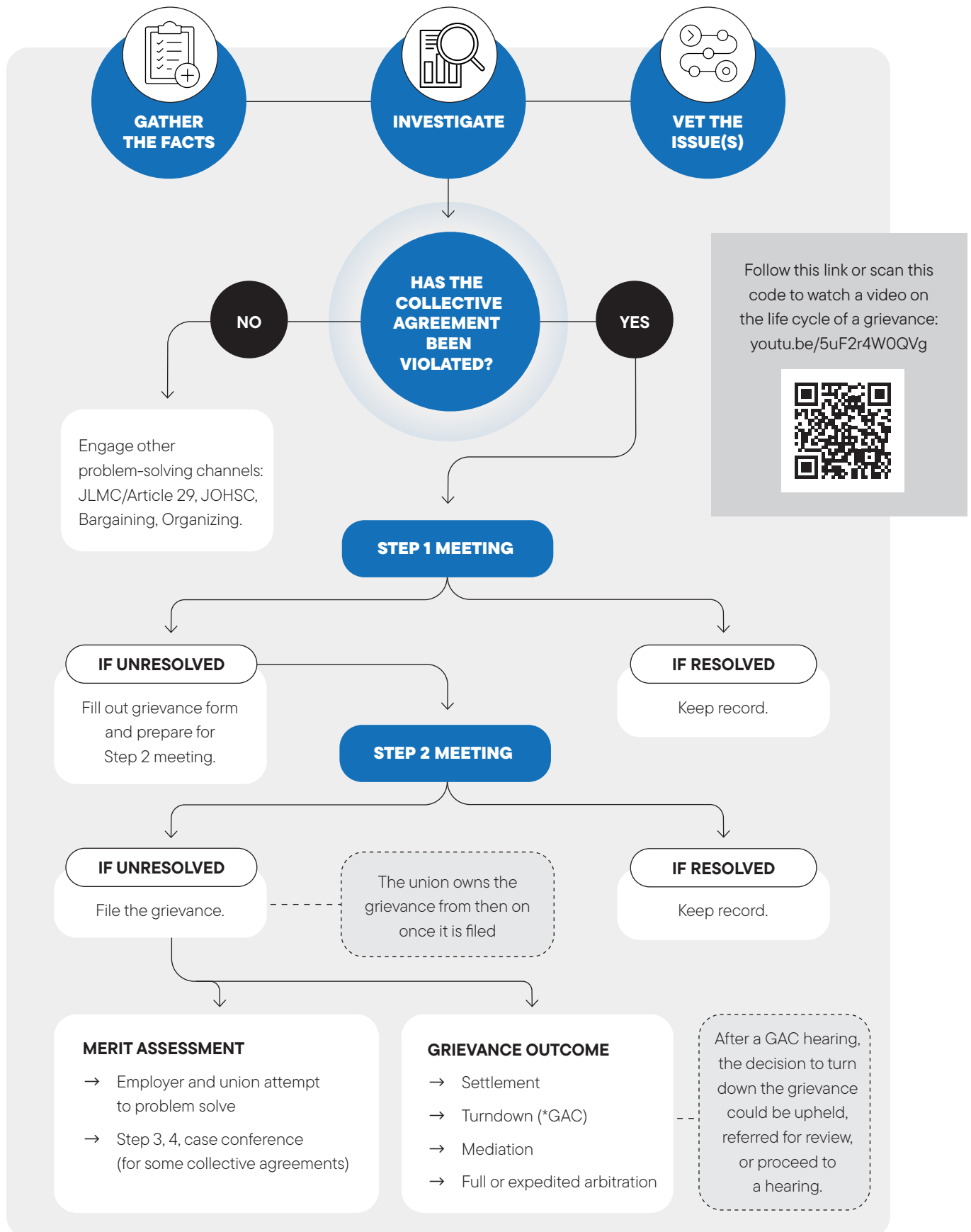
- **An illegal work order,** and
- **An unsafe work order.**

You have the right to refuse unsafe work under the Occupational Health and Safety Regulation. This applies if your employer is asking you to do something that endangers your health and safety. The worker must inform the employer that they are initiating an unsafe work refusal so an investigation can be conducted, and a determination made regarding the alleged unsafe order. Workers are protected from any prohibited action by the employer for exercising the right to refuse unsafe work under the Workers Compensation Act. Contact a worker representative on the joint health and safety committee and the BCGEU's OHS Department if the employer acts upon or threatens any prohibited action for a worker refusing to do unsafe work.

If a member comes to you with a work now, grieve later concern, work with the member to investigate and follow-up on any inappropriate actions by management. Then, look into the channels for addressing the issue, including filing a grievance.



Life cycle of a grievance





Checklist

Grievance preparation

Preparation is the key to success. Stewards must collect the relevant information and build a case that will succeed. Use the checklist below to help get you started as a steward settling a grievance.

Who is involved in the grievance?

- Name, contact info.
- Work location, department, date of appointment, classification.
- Name of supervisor, supervisor's position and witnesses.
- The grievor's record (including absentee record, production record, disciplinary record and lateness record, age, family status).

Get the facts

- When did the grievance occur? Date and time.
- Where did the grievance occur? Exact location, department, machine, aisle, etc.
- Why is this a grievance? What has been violated? The contract? Past practice? A law? Personal rights?
- What happened that caused the violation? What is involved? What is management's contention?

Identify the remedy you want

- What do you want? What needs to happen to correct the injustice?
- Typically, you want the employer to place the grievor in the same position they would have been in had the grievance not occurred.
- Ask for full redress/to be made whole.

Review your material

- Do you have all the facts?
- Do you have everything you need to complete a grievance form?
- Check the facts with the contract, supplementary agreements, precedents or past practice, policies or department rules and arbitration awards.
- Seek out more experienced stewards and local union officers if you need help.

Prepare for Step 1 meeting

- Arrange a meeting with the employer rep to resolve the issue.
- Pay attention to timelines.
- Meet with your grievor in advance to prepare them for the meeting and let them understand what will happen.
- Bring all the necessary documents: collective agreement, policies/procedures, relevant text of legislation, statements, employee records, etc.
- Stay grounded (see tip sheet in your Stewards Handbook).

**adapted from CLC Union Steward Handbook*



Checklist Preparing to meet with management

As a steward you will represent members in meetings with management. This can be a stressful experience. Being prepared to face management is necessary for stewards. Use the checklist below to help you prepare for your meetings with management.

Who will be there for management?

- What do you know about them?
- What is their style?
- Do they have the power to solve your issue?

Put yourself in the employer's shoes

- What is management's position?
- What are their arguments?
- What evidence do they have that supports their position?
- What are the weaknesses in their arguments?
- Beware of management tactics like stalls and protect your timelines

What to bring to the meeting?

- Pen and paper or computer to take notes
- Collective agreement
- Relevant policies and procedures
- Supporting documentation (e.g. pay stubs, employee records, correspondence)
- Your notes
- An outline of your key points and arguments including your desired outcome

Who are you bringing?

- Are you bringing the grievor? It is preferable, but you will need to make sure they are prepared
- Who will speak and when?
- Prepare a subtle signal for when the grievor needs a caucus
- Always ask before the meeting starts: Is there anything else I need to know?





Grievance fact finding

When a worker comes to you with a complaint, the first thing to do is to get the facts. Only then can you decide whether it's a grievance or not. Listen to their story patiently, then ask them specific questions. Remember the "6 W's": Who • Where • What • Why • When • Want (What's the remedy the grievor wants?)

Don't be satisfied with vague statements like "The supervisor's picking on me" or "They're giving us too much work." Ask the questions that will give you the information you need. Sometimes, members assume you know more about what is going on than they do, including the facts of their complaint.

Once you have the basics, investigate promptly. Ask the grievor to write down the full story themselves, providing names, dates and places. Advise the grievor to use actual quotes in relating things they have heard. The exact words may be relevant. The grievor should sign and date their statement. It will be useful for refreshing their memory before any hearing. Remember, if your collective agreement requires that you ask permission of the supervisor to leave your job to investigate a grievance, do so!

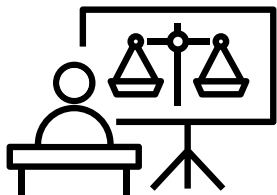
Collect statements from any witnesses and have them signed and dated. Interview not only those witnesses who support the grievor but also those who don't. It can help you find out what happened, and to know what you are up against. Once you have completed your investigation, you should make a written record to

ensure key points are not forgotten or distorted when passed from one person to another.

Be patient. Months may elapse between the events giving rise to a grievance and its final settlement at arbitration.

See these other tip sheets:

- Privacy and confidentiality (p. 27)
- Grievance basics (p. 15)
- Putting grievances into the bigger picture (p. 44)
- Interviewing a member about a grievance (p. 21)
- How to fill out a grievance form (pp. 22-23)
- Grievance meetings (p. 24)



Whodunit?

A grievance is like a detective story – you must sift through all the evidence before you know who did what. It is crucial to treat every round of fact-finding and every grievance as if it was going to arbitration. If it does, you'll be prepared!



Interviewing a member about a grievance

When a member comes to you with a workplace issue, a likely first step when gathering facts is to talk to the member involved. It's up to the steward to gather the facts, investigate, and then decide on a strategy for dealing with the problem. Below are a few tips:

Set the tone for the meeting with the member

In preparing to meet with the member, make sure you are relaxed, be present, limit distractions, and ensure the meeting space is conducive for a private and confidential discussion. If your collective agreement requires you ask permission of the supervisor to leave your job to investigate a grievance, do so! This leave is without loss of pay.

Remember the Duty of Fair Representation

Challenge any preconceived assumptions and biases. Gather the facts and stick to them to assist the member. Do not act in a manner that is arbitrary, discriminatory, or in bad faith.

Use your active listening skills

Listen and pay attention. Be cognisant of body language when communicating. Use summaries to paraphrase, in your own words what you heard. This checks your accuracy and often brings out overlooked facts. Be open to what is being shared. Listening is key, so control your emotions and concentrate on listening to what the member says. Ask questions if something is unclear and to clarify what is being conveyed.

Acknowledge emotions

Emotions are an important part of how we communicate, and they can run high especially in tense situations. Acknowledge and manage emotions to create an environment for effective communication and collaborative problem-solving, while managing your well-being. Create a safe space for members so they are comfortable sharing.

Ask questions to guide your fact-finding

Use the "6 W's": Who, Where, What, Why, When, Want. Follow-up on vague statements to get more information and steer the conversation back to ensure your questions are answered. Use close-ended questions to confirm or clarify. Otherwise, aim for open open-ended questions as they encourage further dialogue, and so you can get as much detail as possible. Why do you think this happened? or, give me an example.

Remember to take notes

Ensure they are clear and legible. They may be used as evidence in a grievance proceeding; so, ensure they are accurate. Send them to the area office along with the grievance form.

Obtain signed and dated statements from the member

Ask the member to write down the full story themselves, providing names, dates, and places. You could also assist them with this. Get them to also sign and date their statement. Advise the member to use actual quotes in relating things they have heard. The exact words may be relevant.

Obtain other relevant information

Ask the member about their disciplinary history, if there were any witnesses, and any other useful information regarding their case. Make note of these for your investigation.

Be prepared to answer questions

Members might also have questions about the case or the grievance process. If you don't know the answer to a question, don't guess or make something up. Avoid making specific promises or assertions about the case, but assure the member you will investigate the issue and make sure to do so.



How to fill out a grievance form



B.C. GENERAL EMPLOYEES' UNION GRIEVANCE FORM

All member personal information is private and confidential and only used for the express purpose of administering the business of the union

GRIEVOR TO COMPLETE (please print)

NAME: _____

MAILING ADDRESS: _____ CITY: _____ POSTAL CODE: _____

LOCAL NO. _____ HOME PHONE: _____ EMAIL: _____

WORK ADDRESS: _____

WORK POSTAL CODE: _____ WORK PHONE: _____

EMPLOYER: _____ BRANCH / DEPT: _____

JOB CLASS: _____ REGULAR FULL TIME: ☐ SENIORITY DATE: _____
REGULAR PART TIME: ☐
AUXILIARY/CASUAL: ☐

ARTICLE (s) ALLEGEDLY VIOLATED: _____ DATE OF VIOLATION: _____

And any other related articles.

DETAILS OF GRIEVANCE: (include all relevant names, events, dates, times, etc.)

Please attach all related documents and correspondence to the Union's copy of the grievance form.

REMEDY SOUGHT: (be specific) _____

Please Note—

A Under BCGEU collective agreements, the employer has agreed to refrain from negotiating with an aggrieved employee, either directly or indirectly, without the consent of the Union. Most BCGEU agreements also oblige the BCGEU to abandon any grievance, which the aggrieved employee(s) attempt to pursue through channels outside the negotiated grievance procedure.

B This will authorize the President of the Union or designate to review my personnel files in order to facilitate the investigation of the grievance.

Grievor's Signature _____ Date: _____

STEWARD TO COMPLETE: (please print)

NAME: _____ WORK PHONE: _____

STEP 1

Grievance discussed with Employer's Step 1 designate: _____ Date: _____

Name and classification of designate: _____

Verbal Response at Step 1: _____

STEP 2

Grievance presented to Step 2 designate: _____ Date: _____

Name: _____ Please print _____ Signature: _____
Signature of Designated Local Supervisor
(indicating receipt of grievance)

Distribution Note—

The Steward is to give the **top copy** to the Employer's Step 2 designate and the **middle copy** to the grievor. Please complete the confidential Steward Fact Sheet on the last page. The **union copy** and the **confidential steward fact sheet** is then to be forwarded to the Area Office immediately. A **copy will be mailed to the Steward** to confirm receipt by the Union (please call if the copy is not received within two weeks).

**STEWARD - PLEASE DETACH GREEN UNION COPY OF GRIEVANCE FORM
- COMPLETE THE STEWARD FACT SHEET ON THE BACK OF GREEN COPY**

EMPLOYER'S COPY
FA/215 2021 - SEPTEMBER

FOR BCGEU OFFICE USE ONLY

312828

Print
clearly

Fill this section out clearly and completely.

Keep it short and factual.

Remember to include the who, what, where, when, and why.

Do not use any derogatory comments.

Be specific about what the grievor wants. Include "To be made whole."

Ensure the member signs and dates this section.

Fill this section out clearly.

Note who you spoke with at Step 1 and their position, and response.

Get the employer's Step 2 designate to print their name, sign, and date this section.



Scan this code to order the grievance form

Scan this code to fill out an online grievance form





How to fill out a grievance form

Print
clearly

REMOVE THIS SHEET BEFORE FILLING OUT
All member personal information is private and confidential and only used for the express purpose of administering the business of the union

CONFIDENTIAL
BCGEU STEWARD FACT SHEET

Is this considered a grievance? (Article in the collective agreement violated? Law? Past practice?) _____

When did the grievance occur?
Date: _____ Time: _____

Where did the grievance or complaint occur? (include a diagram, sketch or photo, if helpful)
Exact Location: _____

What are the facts of the grievance? (Please list in chronological order) Attach additional pages to cover all events, if necessary.

Names of witnesses involved:

Name: _____	Phone: (work) _____ (home) _____
Job/Classification: _____	Relationship to Grievor: _____ (i.e.: Co-worker, Supervisor, etc.)
What they witnessed: _____	

Name: _____	Phone: (work) _____ (home) _____
Job/Classification: _____	Relationship to Grievor: _____
What they witnessed: _____	

Name: _____	Phone: (work) _____ (home) _____
Job/Classification: _____	Relationship to Grievor: _____
What they witnessed: _____	

Employer response to grievance: _____

Employer record of employee conduct: (Review Personnel file if grieving discipline)

Dates	Reasons
Verbal warning issued: _____	
Written warnings issued: _____	
Suspensions: _____	
Any Related Information: _____	

Please Note:
Attach documentary evidence such as seniority lists, cheque stubs, record of similar grievances, copies of disciplinary letters, etc.

Signature of Steward _____

Rev. September 2021



Scan this code to
fill out an online
steward fact sheet.



Provide brief details
for each section
in clear printing



Use an extra piece
of paper if you need
more space



The employer does not
get a copy of this page
– remove it before
giving grievance form
to employer designate



Submit the grievance
form and any notes you
have to the area office
after a Step 2 meeting
if the grievance is
not resolved



Grievance meetings

When you and a supervisor or manager meet to discuss a grievance, you are equals, although the supervisor may have difficulty expressing this.

Before the meeting: make a plan

- Meet with the grievor beforehand to review the facts.
- Decide on your strategy to make your case.
- Discuss how the meeting is likely to go. Be realistic. Agree to who will do most of the talking.
- Agree to stay on the same page. Have a satisfactory resolution in mind.
- Write out the points you are going to make and collect any written evidence (pay stubs, incident reports, etc.).

During the meeting: keep your eyes on the prize

- Take notes (see below).
- Ask questions.
- Keep calm. Stay grounded.
- Be confident but not cocky.
- Be honest (but remember, you don't have to say everything you know).
- If you don't have an answer or know what to say, tell the supervisor you'll get back to them.
- Do not hesitate to caucus if you or the grievor needs to.
- Don't get personal. It's harder to get the boss to agree to your resolution if they become defensive.
- If the boss's tone changes or they raise their voice, call a caucus. Don't get rattled.
- When they go low, you go high. Don't be baited by an antagonistic supervisor.
- Recognize that many supervisors don't have the authority to resolve a grievance at this step.

- Let the employer make their case and explain it, especially in disciplinary matters.
- Agree to the deadline for a response or a follow-up meeting, keeping in mind the timelines set out in the collective agreement.

After the meeting: huddle

- Evaluate how the meeting went.
- Review your notes.
- If the ball is now in the boss's court, note the date for a response or follow-up meeting and make them stick to it.
- If the grievance is proceeding, forward copies of all of your notes and evidence, and the grievance form to the union area office immediately.

The fine art of note-taking

- Take accurate, detailed, and organized notes.
- Print if you can and make it legible. Your notes won't be much use if the staff rep can't read them.
- Try to write down what the employer says exactly.
- Ask them to slow down if needed.
- Use abbreviations:
 - ER for employer (the boss or their representative in the meeting)
 - GR for grievor
 - UN for union
 - S for steward
 - CA for collective agreement



Grievance meetings

Step 1 Grievance Q & A

Who attends a Step 1 meeting?

The grievor, the steward, the employer rep.

Who runs the Step 1 meeting?

Whoever initiates the Step 1 runs the meeting. If it's called by the union, it is the steward's meeting to run.

What documents need to be presented?

All relevant documents that would back up your claim or provide an explanation on the issue being discussed.

What does the CA say?

Review all collective agreement language related to the issue and any related language in the memorandum of understandings etc. Also check out any related employer policies.

Do you present a grievance form at a Step 1 meeting?

There is no need to fill out a grievance form if you are able to resolve the issue at this level.

When can you bypass a Step 1 and go straight to a Step 2 meeting?

When the employer refuses to discuss the matter, or if it is a matter that under the CA goes straight to a Step 2.

Is it ever okay for the grievor to not attend a Step 1 meeting?

It is definitely best practice for a grievor to be at a meeting. They definitely need to know it's happening. If the initial time doesn't work you can ask to reschedule. You can also request a timeline extension when needed.

What can you do if you're having problems scheduling a meeting?

Talk to HR or contact your staff rep.



Dealing effectively with management

No matter how you feel about your boss, it's strategic to establish a good working relationship with them. This is true for your day-to-day interactions but especially important when you have union-related business to deal with.

Set a tone and formalize your important dealings with the boss. Here are a few tips:

- Request to meet away from the work area for privacy. If you can, a "neutral" board room, not their office.
- Do this on the clock, not your own free time.
- Suggest an agenda. It may be just one issue you need to deal with or a few things. Think about what issues require immediate attention and what might be suitable for the next joint labour/management committee meeting.
- Think about what you want to get out of the meeting and ways to get it.
- Try to remember how the interests of workers are different than the interests of bosses. Sometimes, these can converge but don't just assume they do.
- Come prepared to show that you value their time (as they should yours).
- Be respectful, but also expect and demand respect from the boss. In your role as a steward, you are sitting as equals at the table.
- Stick to the issues. Try not to let emotions get in the way of the facts.
- If the meeting turns disrespectful, end the meeting and reschedule for another time or take a break if you need to.
- Don't allow the conversation to go off topic. If it does go off topic, remind the boss why you agreed to meet. If needed, another meeting can be scheduled to discuss other issues.
- Don't let the boss speak disparagingly of members or the union.
- If any agreements are made or deadlines for action are set during the meeting, follow up on them in writing (email is OK).
- Thank the boss for their time.
- Take notes afterwards on how things went. Put a reminder of any agreed deadlines for action in your calendar.

See these other tip sheets:

- Your rights and responsibilities as a steward (p. 7)
- Building trust and relationships (p. 11)





Privacy and confidentiality

Stewards often deal with sensitive matters so respecting privacy and confidentiality is essential to maintaining the trust and respect of members.

To respect privacy and confidentiality:

- Do not share any information you learn about without explicit permission
- Do not gossip
- Keep all documents secure
- Be factual and respectful in your notes
- Submit original notes and documents to your area office for filing or shredding
- Consider setting up a separate email account for your steward duties. Use a free but secure service. Regularly review and purge emails that are no longer relevant
- Do not use your work phone or email for union purposes, particularly regarding members and grievances

The Personal Information Protection Act (PIPA) applies to information collected about members and retained by the union, including some information you obtain as a steward. The union must disclose information held by members if requested.

This may include:

- Notes from meetings and grievance fact-finding
- Information the employer gives to you, like details about a member's medical status or personnel file
- Witness statements
- Grievance form
- Emails related to your steward activities

Follow this link or scan this code to watch a video on Privacy and Confidentiality:
youtu.be/wvz1B77cKR8





Handling a discipline grievance

Handling a member's discipline or dismissal case is one of the more difficult and challenging responsibilities of a steward. The stakes are high for the member, and they are often angry, hurt, and upset. Your job is to protect the worker's rights, and to make sure the employer is acting fairly and reasonably.

A member has the right to be represented by a shop steward in a disciplinary meeting or if they believe that a meeting may lead to any discipline. The employer needs to inform a member if a meeting is disciplinary, of their right to be represented by a shop steward, and reasonable time to seek representation. Members have the right to be represented by a shop steward of their choosing and may seek you out to represent them at a disciplinary meeting. Always speak with the member in confidence before this meeting and interrupt the meeting to caucus if you need to.

Generally, there are two reasons an employer may discipline an employee: incompetence (the employer thinks they are not doing a good job) and misconduct (the employer says the member has done something wrong). In a disciplinary case, the onus or responsibility is on the employer to justify that discipline was warranted. They have an obligation to investigate based on the facts they have relied upon. They present their case first.

As a steward in this situation, you should keep in mind a few key points:

- The Duty of Fair Representation to workers facing discipline or dismissal, even if we think their conduct might warrant consequences. Given the sensitivity of the people and issues involved, you must respect privacy and confidentiality.
- Your role as a shop steward is to know the case based on the facts and information you have gathered, listen to what is being presented, evaluate what is being presented against your investigation, and keep an open mind.
- Do not give the employer the information you have gathered or your notes. Be strategic – remember that it is their case to prove.
- Your goal is to have the discipline revoked or if it is warranted, ensure that it is not excessive.

- There are some established steps that employers should follow, known as progressive discipline. These steps should be reviewed considering the seriousness of the offence and mitigating factors.

Previous decisions (called jurisprudence) are considered by arbitrators when dealing with a case. There are some noteworthy decisions regarding discipline that stewards should know. While *William Scott* tests for whether there was just cause and if the discipline meted out was appropriate, the *KVP* test considers whether the matter is concerning a violation of the employer's rule or policy.



See other tip sheets:

- Leading Case: *William Scott & Co. Ltd.* (p. 31)
- Leading Cases: *KVP Co. Ltd.* (p. 32)



Mitigating factors

A mitigating factor, also known as extenuating circumstances, is any information or evidence regarding the member who has done something leading to discipline or the circumstances of their action that might warrant lesser or no discipline.

Some factors to consider include but are not limited to:

- The previous good record of the grievor.
- The long service of the grievor.
- Whether or not the offence was an isolated incident in the employment history of the grievor.
- Provocation.
- Whether the offence was committed on the spur of the moment as a result of a momentary aberration, due to strong emotional impulses, or whether the offence was premeditated.
- Whether the penalty imposed has created a special economic hardship for the grievor in the light of his particular circumstances.
- Evidence that the company rules of conduct, either unwritten or posted, have not been uniformly enforced, thus constituting a form of discrimination.
- Circumstances negating intent, e.g., likelihood that the grievor misunderstood the nature or intent of an order given to him, and as a result disobeyed it.
- The seriousness of the offence in terms of company policy and company obligations.
- Any other circumstances which the board should properly take into consideration, e.g.,
 - Failure of the grievor to apologize and settle the matter after being given an opportunity to do so.
 - Where a grievor was discharged for improper driving of company equipment and the company, for the first time, issued rules governing the conduct of drivers after the discharge, this was held to be a mitigating circumstance.
 - Failure of the company to permit the grievor to explain or deny the alleged offence.

Source: *Steel Equipment Co. Ltd. (1964)*, 14 L.A.C 356 at pp. 40-41

See other tip sheet:

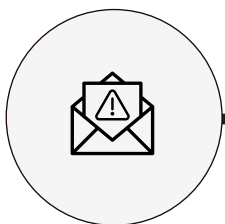
- Leading Cases: *William Scott & Co. Ltd.* (p. 31)



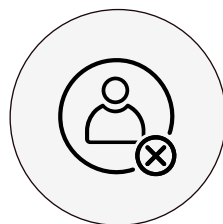
Progressive discipline



Verbal Warning



Written Warning



Suspension



Demotion or Dismissal

When the boss believes an employee is not performing their duties adequately, breaks a rule or policy, or acts improperly, they will likely discipline them. They are expected to use progressive discipline, a principle that requires a measured response, offers opportunity for correction, but acknowledges that serious misconduct may warrant more significant consequences. An employee always has the right to have a steward present at a meeting with the boss if they believe it may lead to any disciplinary measures. Disciplinary measures are placed on an employee's work record for a period of time, usually outlined in your collective agreement.

Verbal warning

An employer may skip a step or two of this process if the infraction is serious. A steward should consider whether the employer's actions are warranted. The boss has an on-the-record discussion with an employee about something they're allegedly doing wrong which clearly outlines what the employee has allegedly done wrong, what the proper way of doing it is, and the potential consequences for doing it incorrectly again. An informal written note of the verbal warning may be made in the employee's work record.

Written warning

The boss presents a formal written warning that is placed on the employee's work record for a period of time after a further alleged infraction of the same or similar type, or a more serious unrelated one.

Suspension

The boss suspends an employee without pay for alleged misconduct, repeated infractions or serious performance issues. The length of time will vary depending on the allegation. This step may be repeated again with longer suspensions in response to further alleged misconduct or unsatisfactory performance. Sometimes, an employee may be suspended with or without pay while the employer investigates.

Demotion or dismissal

The boss demotes an employee to a lower position or terminates their employment for alleged serious misconduct or performance issues.

See these other tip sheets:

- Letters of expectation (p. 40)
- Handling a discipline grievance (p. 28)
- Privacy and confidentiality (p. 27)



Leading cases

William Scott & Co. Ltd.

The *William Scott* decision is the leading case when it comes to discipline and discharge. In this case, the arbitrator spelled out three key questions to consider in matters of employee discipline and dismissal. Although the case is over 40 years old, it is still relied on today.

Leading case: *William Scott*

Has the employee done or failed to do something that justifies discipline or dismissal? This is known as just cause.

YES

Is the employer's response reasonable?
Are there any mitigating factors to consider?

NO

If the answer is no and the employer's response is excessive: What is the appropriate consequence for the employee?
Are there any mitigating factors to consider?

The first question is that of fact and aims to answer if the worker has done or failed to do something that justifies discipline or dismissal. The employer must be able to prove on a balance of probabilities that the worker did what they were accused of doing. The onus of proving just cause is on the employer based on the evidence presented. If the employer is unable to do so, the discipline or discharge is not warranted.

If there is just cause for issuing discipline, the next step is to assess whether the discipline imposed fits the offense. The mitigating factors, also known as extenuating circumstances, need to be considered.

If there was just cause, but the discipline imposed was excessive, the third question seeks to identify what would have been appropriate instead. This is determined on a case-by-case basis and the seriousness of the offence.

Follow this link or scan this code to watch a video on the *William Scott* decision:
<https://youtu.be/OoPCi0xvSO4>



Source: *William Scott & Co. v. C.F.A.W., Local P-162*, 1976 CarswellBC 518, [1977] 1 Can.

Note: This is a summary of the main points of the case.

See other tip sheet:

→ Mitigating factors (p. 29)



Leading cases

KVP Co. Ltd.

The KVP decision is the leading case when it comes to the employer unilaterally implementing policies or rules.

The employer has the right to manage the workplace. They can issue rules or policies without consultation or sign off by the union. However, in doing so, there are certain principles that must be adhered to. This is known as the KVP test.

In this case, the arbitrator spelled out six principles that must be satisfied when a rule is unilaterally introduced by the company, and not subsequently agreed to by the union:

1. It must not be inconsistent with the collective agreement.
2. It must not be unreasonable.
3. It must be clear and unequivocal.
4. It must be brought to the attention of the employee affected before the company can act on it.
5. The employee concerned must have been notified that a breach of such rule could result in his discharge if the rule is used as a foundation for discharge.
6. Such rule should have been consistently enforced by the company from the time it was introduced.

Assessing whether an unequivocal rule or policy is reasonable, depends upon the facts of the case and the balancing of interests between the employer and workers.

If the rule or policy is brought to the attention of the worker and relied upon for discipline or discharge, that alone does not constitute just cause. The rule or policy will still need to be evaluated based on the six principles in addition to determining just cause. This means in cases that involve discipline or discharge where an alleged breach of an employer rule or policy is concerned, the principles of the *William Scott* and *KVP* decisions will need to be satisfied.

Follow this link or scan this code to watch a video on the KVP decision:
<https://youtu.be/OFIYIMPW-Jc>



Source: *KVP Co. Ltd and Lumber & Sawmill Workers' Union Local 2537, [1965] 16 L.A.C. 73*

Note: This is a summary of the main points of the case.



Bullying and harassment in the workplace

Unions must ensure that work is safe for everyone. Unions protect the rights of all workers, and if one worker is vulnerable, all workers are affected.

Your collective agreement will have a detailed definition of harassment and bullying, but simply put, it is “the use of real or perceived power to abuse, devalue or humiliate.” In the workplace, a worker can experience harassment from management but also from co-workers. The boss has real power, but with coworkers, it’s usually perceived power that’s at play.

Harassment may focus on something identifiable, like race, gender, religion, sexual orientation or identity, or a disability. The focus may be on other things, like physical appearance, personality traits, or the assumption that a worker doesn’t fit in with a dominant group. Often, it’s expressed through ‘jokes’ and remarks, but it can also be discriminatory behaviour, social exclusion, and even physical actions. Stewards may be involved in harassment and bullying complaints.



Supporting a member with a harassment complaint

- Take the complaint seriously. It takes courage to come forward.
- Reassure the member and validate their concerns.
- Encourage the member to keep notes on all incidents and record the facts and whether there are any witnesses to the harassing behaviour.
- Review the collective agreement article on harassment, the complaints process and outline the member’s options.
- Get help and advice from another steward or the staff representative.
- Respect privacy and confidentiality.
- If the alleged harasser (called a respondent) is a coworker, they are entitled to union representation. A steward can’t represent both the respondent and the member alleging harassment (called the complainant).
- Be alert to any retaliatory actions by an alleged harasser toward the complainant.
- Think about whether your workplace needs training on harassment and bullying.
- Stand in solidarity, demonstrate our union principles of fairness, equity and inclusion.
- As a steward, you can set the right example. Treat everyone with respect and courtesy. Interrupt poor behaviour or unacceptable jokes. Intervene in oppressive conduct or actions.



Joint committees

Joint Consultation Committees

The *BC Labour Relations Code* requires that collective agreements include a provision for a joint consultation committee:

“to promote the cooperative resolution of workplace issues, to respond and adapt to changes in the economy, to foster the development of work-related skills and to promote workplace productivity.”

This committee is also referred to as the Article 29 Committee (under the Main Public Service Agreement) or generally as the Joint Labour Management Committee (JLMC).

For worksites that do not have a functioning JLMC, issues are unlikely to get addressed until they turn into a grievance. The JLMC is a proactive, collaborative, and consultative channel for addressing workplace matters. The joint labour management committee is generally the starting point to discuss workplace matters affecting the parties unless the collective agreement states otherwise. Not all topics are suitable for discussion at the committee table such as dealing with the specifics of grievances or negotiating the terms of the collective agreement. Discussions regarding issues and circumstances contributing to grievances and misunderstandings are within this committee's scope. This committee is an effective tool for relationship-building and joint problem-solving during the term of the collective agreement.

In the provincial public service (government), each ministry has an Article 29 committee pursuant to the Main Agreement. Representatives on the Article 29 committees are appointed by the president from relevant components based on recommendations from component vice-presidents.

In other sectors, collective agreements establish joint labour management committees (JLMC) for each certification or bargaining unit. Sometimes, sector-wide committees and committees with specific mandates like training, are also created. Representatives on the committee may be chosen by members, appointed or participate by virtue of their position (steward or bargaining committee chair).

This committee has an equal number of employer and worker representatives. If you are interested in participating on your JLMC or Article 29 Committee, speak with the staff representative, local chair, or Component VP. The employer does not get a say in the selection of worker representatives. The term is for the duration of the collective agreement. The committee stands down once the Notice to Bargain is issued and is active again once the agreement is ratified. Training is offered for members on the committee. Visit the Member Portal or the BCGEU Events page to find a course in your area.

Joint Occupational Health and Safety Committee

The laws that govern health and safety in B.C. are the *Workers Compensation Act* and the *Occupational Health and Safety Regulation*. Workplaces with 20 or more employees regularly employed are required to have a joint health and safety committee. Workplaces with 10 to 19 employees regularly employed are required to have a worker health and safety representative. BCGEU collective agreements for smaller workplaces may also require a committee. Some collective agreements also have a provision for a Provincial JOHSC.

The JOHSC deals with workplace health and safety matters.

This committee has an equal number of employer and worker representatives. If you are interested in participating on your JOHSC, speak with your local chair who appoints members after considering various factors and consulting with a staff representative. The employer does not get a say in the selection of worker representatives.



House meetings

A pioneer of community organizing once said that you could organize the entire country one house meeting at a time. Cesar Chavez and Delores Huerta, two of the founders and leaders of the United Farm Workers (UFW), used house meetings as a basic tool to organize migrant farm workers in California's Central Valley. The house meeting then became a mobilizing tool for the union in the great grape and lettuce boycotts of the 1970s and 1980s when it was used to build broad popular support among the middle class. Second wave feminist activists also used small consciousness-raising groups - a sort of house meeting - to raise awareness and build the movement.

The house (or small group) meeting is an opportunity to accomplish a number of things that are central to good organizing, including:

- Sharing deeply felt concerns
- Exploring and identifying common values
- Recognition and validation of individuals and their contributions
- Identification of issues
- Testing of commitment and power to mobilize
- Political education
- Community building
- Identify, test, train and nurture old and new leaders

House meetings meet a profound need for a sense of community and build solidarity. The genius of the house-meeting is that it blends the informality of the home (or café, public park or other non-traditional setting) with our organizational purpose of member engagement.

How to hold a house meeting

- Find a venue. If it's appropriate, you could meet at the home of a member who is able to host. Otherwise, look for smaller, more intimate and quiet spaces like a room at the public library, a small, local café, or even a public park on a beautiful day. A house meeting might also be held in the workplace before or after a shift.
- Pick a date and time that works for the members who you want to connect with.
- Make it personal. This is important. No paper meeting notices. No emails. Speak in person with five–10 members of your organization. Tell them you want to hear about what's on their minds and what they're concerned about, the challenges and pressures they're facing. Ask them for a commitment of 45 minutes to an hour and give them the details of date, time and location. Don't do this too far in advance, maybe a week or so. A bit of planned spontaneity helps keep it informal and urgent at the same time.
- Let them eat cake. Coffee and snacks are a nice touch but not necessary. Don't let this take away from the purpose of the meeting.

Continued on next page



House meetings

Continued

- Start and end your meeting on time. Although you're aiming for an organic feel to your house meeting, you want to signal to members that you're respectful of their time. It's also possible to over-talk some things.
- Focus. Turn your cell phone off and put your notebook away. You are here to listen.
- Open up the conversation with some brief introductions.
- Introduce a topic your members care about. It doesn't have to be a strictly workplace issue. For example, you could ask people about housing insecurity or their sense of belonging to their community or you could ask, "What's on your minds?" or "How are things going?".
- Stay grounded. Don't be on the defensive. You don't have to convince anyone of anything - other than your sincere interest in what people have to say. Acknowledge what members are saying and how they feel. Empathize. If things turn negative, try to refocus or reframe gently. One question to ask a member who is agitated, is: "What are you willing to do about it?".
- Wrap it up. End by thanking members for attending. Don't make any big promises but indicate what you will follow up on and with whom (take out your notebook now).
- Reflect on the meeting afterwards. What did you hear? Do these members need support to address a problem? How can we do that? Did anyone strike you as a potential leader? How can you encourage them? What next steps should you take to deepen these members' engagement?
- Repeat. Plan your next house meeting with a new group of members.



See these other tip sheets:

- Engaging members (p. 14)
- How to be a good listener (p. 12)
- Building trust and relationships (p. 11)
- Putting grievances into the bigger picture (p. 44)



How to create a membership list

The union holds information about members. You can always request this information for your workplace from your area office. However, the information we have may not be accurate or current.

As a steward, you will want to have a picture of the members you represent and an efficient way to communicate with them. We suggest you develop your own working membership list. Start with making a map (see the Map your workplace tip sheet). It's easy to do and will come in very handy. Then, create a spreadsheet, using a computer program such as Excel or Google Sheets. Enter one row for each worker, even people you don't have much information about. Google Sheets has the advantage of being cloud-based and is updated in real time. You can also share the list with other stewards. Search YouTube for tutorials on Excel and Google Sheets or try lynda.com through your public library.

Keep it up to date

Charts are only as useful as they are accurate. Print out a copy of your chart to carry around with you. Continually update it and enlist other stewards and coworkers to help. This can include filling in gaps in contact information, adding people who are missing from your list, and removing those who have quit, gone on leave, or changed assignments.

Make a wall chart

Also make a big version of your chart to display on the wall, with all the names grouped by work area, job, and shift. Colour-code it to show your organizing progress, so you can see at a glance where your union is weak and where it's strong. For instance, highlight everyone who has committed to attend a rally, signed a petition, or worn a button. Put a dot beside the name of each steward, activist, or team member.

Make a column for each bit of information you want to track, such as:

- First name
- Last name
- Cell phone
- Home phone
- Email address
- Job title
- Work area, department
- Shift
- Date of hire
- Wage rate, classification
- Primary language
- Actions member has taken

See these other tip sheets:

- Map your workplace (p. 42)
- Privacy and confidentiality (p. 27)
- Reverse side: a blank example



Example membership list

First name	<i>Harbinder</i>
Last name	<i>Singh</i>
Cell phone number	<i>604 999-1111</i>
Home phone number	<i>604 999-2222</i>
Email	<i>hsingh@email.ca</i>
Position & classification	<i>Residence worker</i>
Department/branch	<i>Tiny Trailer Group Home</i>
Shift	<i>Evenings</i>
Seniority	<i>July 1, 2003</i>
Issues	<i>Scheduling</i>
Actions taken	<i>Attended meeting</i>
First name	
Last name	
Cell phone number	
Home phone number	
Email	
Position & classification	
Department/branch	
Shift	
Seniority	
Issues	
Actions taken	



How to organize a workplace meeting

It's hard to get members out to meetings, especially when it's at the union office. So, workplace meetings can be an efficient way to hear from members and provide them with relevant information.

Tips for effective workplace meetings:

- Have a clear purpose for the meeting – don't hold meetings for the sake of it.
- Let members know about the meeting at least a week in advance.
- Talk to members personally to ask them to attend and to spread the word about the meeting.
- Start your meeting on time and end it on time. Keep it as short as possible (one hour or less).
- Schedule meetings when most members can attend. In a workplace with many different shifts, give members the option of two or more sessions.
- Keep the agenda moving and make it positive and constructive.
- Share the spotlight – find a balance between providing relevant information and hearing what's on members' minds.
- Thank members for attending.
- Follow up afterwards with members who raised specific issues.
- Evaluate the meeting with other stewards or trusted members. How did it go? Could you do anything differently next time?

Can't hold a meeting at work?

- Try meeting with smaller groups of five-10 members in a lunchroom.
- You can book a room at the union office if needed and, if you're in a community where we don't have an office, look for easily accessible options like a library or community centre.
- Hold a drop-in or small meeting in a nearby coffee shop or pub.

Things to include in your workplace meeting notice:

- Date
- Start and end times
- Location
- Agenda or purpose of the meeting – make this interesting, grab members' attention
- Your contact information

More information and resources

- Find out when your local meets and download a workplace meeting notice to post on the steward resources page at: <https://my.bcgeu.ca/login>.



Letters of expectation

A letter of expectation is a tool used by an employer to outline what is expected of all employees. It is not disciplinary and is intended only to communicate or clarify the employer's expectations of behaviour or performance.

A letter of expectation should:

- Be neutral enough that it could apply to any employee
- Set out the employer's reasonable expectations of the employee
- Include the changes they would like to see and possibly a time for making the change
- Be positive in tone
- Offer the resources and training available to assist the employee to meet the expectations

A letter of expectation should not:

- Be disciplinary
- Allege any wrongdoing
- Refer to consequences

Employers often get this wrong and issue what is essentially a letter of warning, which is disciplinary. Letters of expectation are placed on an employee's employment record indefinitely, so it is very important to ensure the boss doesn't overreach. An improper letter of expectation should be grieved.



Good advice for a worker who is given a proper letter of expectation: do their best to meet the expectations and take advantage of any training and support that's offered.

See these other tip sheets:

- Progressive discipline (p. 30)
- Handling a discipline grievance (p. 28)
- Privacy and confidentiality (p. 27)



Example of a letter of expectation



Donna Kimber
123 Spring Break Road
Kamloops BC V2C 4N7

March 20, 2018

Dear Donna,

Re: Letter of expectation

I am providing you with this letter of expectation regarding shift start times. All staff are expected to be punctual and maintain regular work attendance as scheduled. Unscheduled absence adversely affects our ability to provide the highest quality of care for our residents.

In the event of an absence or late arrival, employees are expected to follow our procedures for notifying the office by calling the absence line at 250-828-3529.

I am sure you will meet this expectation effective immediately and on a continuing basis.

Sincerely,

Chris O'Leary
Manager
Dogwood Manor

cc: Human Resources



Map your workplace

Taking the time to map your workplace will help you understand the scope of your membership – not just where they are, but also what connections they have, and what depth of support the union has. Mapping is the most effective when you pool your knowledge with other stewards, health and safety representatives and leaders to:

- Know who and where your members are.
- Identify work and social groups, and their leaders.
- Set up a member-to-member communication network.
- Assess levels of support for the union.
- Identify where we need more stewards or health and safety representatives.
- Make power and social relationships visible.
- Get a handle on members' concerns and issues.
- Divide and assign responsibilities to your team members.

Getting started

- You will need a large sheet of paper, colour markers and highlighters.
- If you represent members on other floors of a building or at another location, create separate maps for each.
- Be sure the map is large enough to show the information clearly.
- Start with the physical space. Draw an outline of the area, floor or building, showing entrances, exits, and windows. Label the offices, meeting

rooms, loading docks, storage areas, lunchrooms, and bathrooms, etc. and add details such as copy machines, desks, and water coolers.

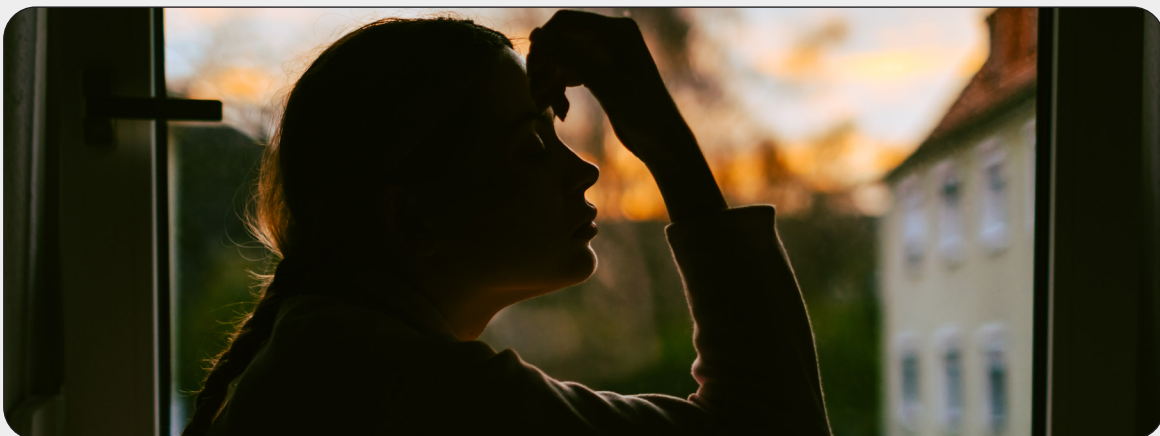
- Next, include the physical locations of workers, managers, key gathering points and the location of bulletin board(s).
- Add motion. Draw the flow of work or production, and/or the paths that different people take through the space regularly, in different colours.
- Are there spots where the flow of work tends to get bottlenecked? These could be important pressure points. Who works there? Are there places where people congregate, like the break room or the proverbial water cooler? These could be good places for outreach conversations, or group gatherings.
- It's best to work from a list of all employees in your workplace or department (whatever you're mapping). Otherwise it's surprisingly easy to forget people, especially those you don't work closely with, part-timers, or those with unique jobs. The lists provided by the union may be out of date. Try the boss's phone list or work schedule. Be resourceful.
- Don't include any information about people that you wouldn't be comfortable with them seeing.
- Highlight the members you can count on and identify some potential new leaders.
- Keep your map up to date and review it regularly. Track much of this information in a chart or table using a simple program like Excel or Google Sheets.

See these other tip sheets:

- How to create a membership list (p. 37)
- Privacy and confidentiality (p. 27)
- Reverse side: examples of maps.



Mental health and work



Mental health is an issue for workers and unions. It affects our members and their families and impacts our workplaces. Workers in certain occupations may be vulnerable to particular stresses, including post-traumatic stress disorder (PTSD). Members of equity groups may also disproportionately experience mental illness. In our workplaces, the impacts include absenteeism, employee turnover and lost productivity.

According to the Mental Health Commission of Canada, about a third of short- and long-term disability claims are attributed to mental illnesses, and the total cost to our economy exceeds \$50 billion each year. The public dialogue around mental illness has thankfully opened up in recent years, much of it focused on awareness, treatment and accommodation. These are all important, of course, but we also need to have a broader conversation about the work and social conditions that contribute to the problem. The push for lean workplaces has increased workload while precarious employment, low wages and growing inequality all add to the many stresses each of us face. As workplace and union leaders, we can fight for psychologically healthier and safer workplaces, reasonable workloads, proper funding for mental health care, and a more fair and equitable society.

As a steward, you can model compassion and support for coworkers experiencing mental illness. Here are some tips:

- Avoid using stigmatizing language.
- Encourage strong relationships based on solidarity.
- Create an atmosphere of trust where people feel safe to discuss their mental health.
- Reframe real stressors in your workplace as risks to psychological health and safety.
- Practice and model self-care and encourage coworkers to do it as well.
- Learn more about mental illness.

More information and resources

- Mental Health Support Line 310-6789 toll-free from anywhere in B.C. (no area code required)
- Mental health and substance use information: <https://www.heretohelp.bc.ca>



Putting grievances into the bigger picture

You will spend a lot of time dealing with grievances as a steward. It is one of the processes we have to defend – our collective agreement rights. But it has limitations. Members file grievances with an expectation of a speedy and just resolution.

When we're unable to resolve grievances locally, we rely on an arbitrator to hand down a decision, a process that can take a very long time. Often, win or lose, the whole membership rarely hears about the outcome. In most cases, grievances themselves do not empower workers.

Supercharge grievances

You can also view grievances through an organizing lens.

Put grievances to work for change

A grievance, especially one that isn't successful, may expose a problem that needs fixing at the bargaining table. Keep track of all grievances that involve interpretation questions and policy issues. When it comes time to prepare for negotiating a new collective agreement, review and analyze these grievances, especially the unsuccessful ones. These may form the basis of a bargaining proposal.

Ask yourself:

- Does the grievance give us a learning opportunity for workers?
- Is the issue behind the grievance a symptom of a bigger problem?
- How can we involve the grievor in the process and encourage them to take some ownership? What specifically can the grievor do to help solve the problem?
- How will taking on this grievance help build the union in the process?
- How can we keep members informed about the progress and outcome of a grievance and the issue behind it?
- Who else is impacted by this issue? How are they affected or connected?
- How important is it to members? Is this issue widely and deeply felt?
- How can members support the grievor(s)?
- Has this been an issue in the past? Who was involved and what was the outcome?
- When we win a grievance, how can we celebrate it?
- Can we turn the problem behind the grievance into an issue and build an action or campaign around it?



Social media and work

Social media has exploded in recent years and most stewards and members have an online presence. Social media includes blogs, Facebook, Instagram, LinkedIn, Twitter, YouTube, chat rooms and email. This creates some new challenges and risks for workers.

Social media posts are immediate, very difficult to erase or retract, and can be easily forwarded or copied. Never assume that a post is – or will stay – private, or that a pseudonym will keep you anonymous. In some cases, employers may attempt to discipline you for your off-duty conduct, including social media use.

Here are some tips on how (and how not) to use social media at work and in your steward role. These tips are also good advice for all members.

DON'T

- Use personal email and social media at work – the boss expects you to be working not posting or tweeting.
- Use the employer's computers, mobile phones or email for inappropriate or personal use.
- Take and post pics of coworkers or clients/customers without express permission.
- Make negative comments about the employer in a post.
- Reveal confidential information about grievances or other work issues.
- Post a selfie at the beach if you have called in sick.

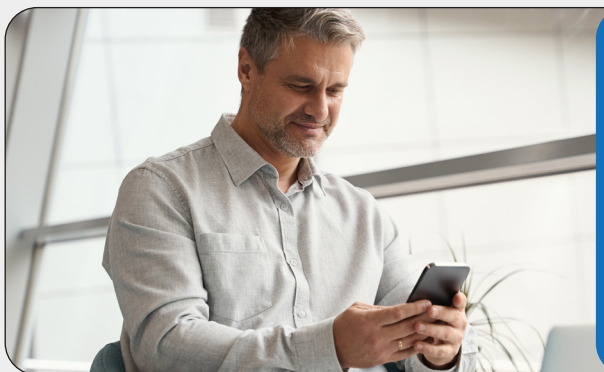
Follow this link or scan this code to watch a video on social media and work:

<https://youtu.be/-0xTuzPVN3Y>



DO

- Use social media to let members know about union events and news.
- Take your cue from the union about what's OK to post about bargaining or other workplace issues.
- Think about whether to add managers as "friends" and don't add clients on social media.
- Set a respectful tone in social media posts.
- Protect the security of your information and restrict access to your accounts.
- Stop and think before you post. If it's not something you would say in public, it might not be appropriate for a post.



Follow and like our social media account and use our tags

Twitter: @bcgeu_learning and @bcgeu

Instagram and Facebook: @bcgeu

#justbcgeuthings

#bcgeupeople

#canlab





Steward FAQ

What if a member doesn't want me to represent them?

Members can choose any steward to represent them. However, an employee can't put off a time-sensitive meeting with the employer or ignore grievance timelines while they find another steward to represent them.

Can I represent myself?

No. The staff representative will represent you with the employer.

What if the employer denies a member their right to steward representation?

Advise the member to take notes during the meeting, talk to you immediately afterwards and file a grievance about the denial of representation.

What if the employer won't let us caucus during a meeting?

Politely end the meeting and remind the employer that caucusing is a recognized part of the process.

What if a supervisor refuses to work with me?

The employer does not always know if supervisors are doing a good job or not. If you cannot get a supervisor to work with you, let the employer know there is a problem, and how you have tried to solve it. Use the grievance procedure if the supervisor is violating the collective agreement. If the problem continues, talk to members of your local executive about how to put pressure on the employer to deal with the supervisor.

What if a supervisor asks me to pass a message to the members?

If it's formal communication with the union, tell them they must write to the staff representative. Otherwise, let the supervisor know they should be communicating with employees.

Can I be disciplined for doing my job as a steward?

An employer may try, but if you are acting reasonably and in good faith, they can't retaliate or discriminate against you for fulfilling your responsibilities. If the employer retaliates or discriminates against you for doing your job as a steward, contact the staff representative to file a grievance.

