

DRAFT (Rev. March 2018)

Stronger Together:

University of the Fraser Valley Faculty and Staff Association Operational Review 2017-18

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under the Auspices of the FSA Review Sub-committee



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Executive Summary¹

In the fall of 2016, the UFV Faculty and Staff Association (FSA) executive established a sub-committee to begin a full operational review of the FSA. This project represents an intentional and comprehensive examination of the FSA executive structure and its operations. A project of this nature and scope has never been undertaken by the FSA and the process required the development of a number of assessment tools including surveys of membership, the executive, FPSE Presidents, and Stewards.

Ultimately, the goal of this project is to understand what the architecture of the FSA must be to ensure sustainable, equitable, and healthy working conditions for UFV. The following self-study provides a narrative that analyses the current state of the FSA and its membership. This analysis illustrates the ways in which the present FSA executive structure limits opportunities to strengthen membership engagement when confronting workplace issues. The current structure fosters a centralization of power and control that constrains efforts to mobilize and empower members. Because the FSA is only as strong as its membership, this generates a significant risk for the association's future as a legitimate and respected stakeholder at UFV.

The lens of this study is based on scope questions (see Appendix C). These questions provide the framework for the entire document, focusing analysis to the ways the FSA operates as an effective and efficient organization. There are many layers to the self-study process, and there are many areas that would benefit from further and deeper inquiry. The following document, however, captures a number of important areas that inform the present state of the organization, providing substantial evidence for change.

The recommendations that follow the narrative are designed to be constructive and strategic, taking into account the FSA's recently adopted *Strategic Plan*.

¹ The following report was written by Christina Neigel, Faculty VP, under the auspices of the FSA Executive. Having approved receipt of the document, the FSA executive presents it to membership for discussion. The recommendations that follow the self-study offer membership options for strengthening the operations of the Association. Some recommendations, specifically 1, 6, and 7, require extensive consultation with membership and it is understood, by the FSA Executive, that membership requires opportunities to read, reflect, and vote on constitutional changes that would impact the FSA executive structure and election processes.

Purpose

This is a comprehensive operational review of the UVF Faculty and Staff Association, a British Columbia post-secondary labour union that operates in accordance with the BC Society Act and is a certified Trade Union under the Labour Relation Board of BC.

While this is the first FSA review of this magnitude, it is interesting to note that the FSA did strike a restructuring task force in 2002. This smaller project advocated for incremental changes to the FSA executive structure that included recommendations to separate staff and faculty voting for articles in collective agreements as well as some restructuring for executive releases. Further, a memo to the executive from this task force suggested that withdrawal from affiliation with of the provincial Federation of Post-Secondary Educators (then called College-Institute Educators' Association, CIEA) was potentially dangerous, arguing that "this may be the time, more than any other, to stand with our colleagues and speak with one voice" (FSA Memo, 2002, p. 4).

The task-force memos from the 2002 self-examination suggest that FSA concerns over structure, fees, and purpose have been long-standing. Using a carefully charted method, this current operational review offers a more detailed and holistic examination of the FSA with the hope to offer a useful template that the Association can use for further planning and review purposes.

Review Method

Despite its more than 40-year history, the UFV Faculty and Staff Association has never undertaken an intentional and comprehensive review of its structure and operations. Such a process, however, can provide the organization with a clear assessment of how the Association:

- serves membership;
- organizes volunteer positions;
- ensures resources for the work of its volunteers and paid staff;
- manages its records;
- interacts with other UFV stakeholders; and
- fits into the broader labour context.

There is no template for reviewing volunteer organizations, particularly labour unions. The following information outlines how a review process was established for the FSA's purposes.

1. Establish a Review Sub-committee (RSC) of the FSA Executive; members of this committee consist of the:
 - Faculty Vice-president
 - FPSE Representative for Human Rights & International Solidarity
 - Agreements Chair
2. Establish review scope questions (these were approved by the RSC and FSA Executive)
3. Collect data
 - FPSE Presidents' Council Survey (Appendix H)
 - FSA Executive Survey (Appendix E)
 - FSA Membership Survey (Appendix D)
 - UFV Institutional Research data (e.g., UFV *Factbooks*)
 - FSA documentation (e.g., minutes of executive & subcommittees, policy documents)
 - Consultations with FPSE staff, FPSE Presidents, and other labour specialists and academics
4. Report progress to membership at 2017 AGM
5. Analyze data
6. Draft review document
7. Review and recommend operational review document to FSA Executive (RSC)
8. Solicit members of the External Review Committee upon recommendation of the FSA Review Committee (President)
9. Review and receive operational review document (FSA Executive)
10. Release review document to External Review Committee

11. Review Committee and President meet with External Review Committee

12. Prioritize recommendations

13. Present to membership

The FSA has a long and complex history. This review is not a historical analysis. While interesting, such work is beyond the scope of this review. UFV's transition to a university in 2007-08 has been used as the key starting point for analysis. It was at this time that the direction of UFV began to change course in ways that inform the FSA's present circumstances.

Definitions

Auxiliary Employee

Any employee, whether included or excluded, appointed for a limited period on a day-to-day basis, usually for the purposes of substitution for other employees for illness, short leaves, and other emergency circumstances.

Excluded Employees

UFV employees who are not members of the UFV Faculty and Staff Association.

Faculty

This term is applied broadly at UFV and, as such, can refer to anyone with a Type B faculty contract. It should be noted that the term, while most often used to refer to regular teaching faculty, encompasses those whose primary role may not be teaching and is sometimes used to also describe sessional instructors and those teaching on Limited Term Contracts.

Academic Support Faculty

UFV employees who have a Type B (faculty) contract but have modified conditions of employment under the Collective Agreement (Article 19). Within this group there are:

- **Librarians:** “assist students, faculty members, and programs/departments with their information, research, and program development and support needs” (Article 19.2).
- **Counsellors:** “assist students with personal, crisis, and career counselling, provide students with instruction in study skills, and consult with students, faculty, staff, and administrators on matters pertaining to mental health and academic success” (Article 19.3).
- **Academic Advisors:** “assist students in formulating educational plans, provide information to students with regard to institutional policies and procedures, refer students to services designed to increase their academic success, and support faculty and administrators in designing curriculum and developing policies and programs” (Article 19.4). These positions are different from staff advisors who operate as program advisors/administrative assistants performing work within various UFV program areas.

Directors

UFV has two different kinds of directors, differentiated by their status as a member or non-member of the UFV Faculty and Staff Association. Included directors are considered a “Type B Professional” in the Collective Agreement (Article 20). While the “Type B Professional” term clouds meaning in the Collective Agreement, they share some aspects and expectations as other Faculty Type B employees.

Teaching Faculty

UFV employees who are employed in ongoing full-time or part-time positions on a Type B contract and whose primary role is to teach courses and programs of study. The term “Type B faculty” is most often used to refer exclusively to this group of employees.

Limited Term Faculty

UFV employees hired on full-time, temporary 1 year (12 month) contracts, and whose primary role is to teaching courses and programs of study. These employees work under a Limited Term Appointment (LTA) and are not guaranteed employment beyond their term.

Sessional Faculty

UFV employees who are hired on contract on a term-by-term basis to teach specific courses or programs of study. Often described as “part-time,” these employees do not hold permanent positions.

Federation of Post-Secondary Educators (FPSE)

An organization representing 19 independent British Columbia labour unions from both public and private post-secondary education institutions. Formed in 1970 as the College Faculties Association, the organization changed its name in 1980 to College and Institutes Educators Association and again in 2004 to its present name.

Letter of Agreement / Understanding / Memoranda of Agreements (LOA / LOU/ MOA)

Letters in writing signed by the Employer and the FSA. Such letters tend to be “side” agreements that are not part of the primary collective agreement and are used to clarify or solve emerging problems.

Staff

Even more diverse in the range of duties from faculty, staff are all members of the FSA who are not classified as Faculty.

Type A

UFV employees with permanent full or part-time appointments.

Type C

Non-permanent UFV employees hired to a position with a set location and hours, contracted *for more than 50%* of an annual duty load for a specified term not to exceed one year.

Type D

Non-permanent UFV employees hired to position with a set location and hours, contracted *for less than 50%* of an annual duty load for a specified term not to exceed one year.

External Contexts

Labour Context in Canadian Higher Education

Although the FSA operates within the framework of UFV, its structure and actions are situated within a complicated political and socio-economic landscape. This context informs the way work is both perceived and performed at UFV. Recommendations generated from this review incorporate a contextual understanding of how post-secondary labour is shaped more broadly.

With increased costs and reduced transfer payments, provincial governments bear the burden of managing the growing gaps in funding and demands for post-secondary education (PSE). The pressures that PSE faces are complex and their impact on labour is not easily measured or understood. In their politically charged report, the Canadian Association of University Teachers' (CAUT) *2014-2015 Almanac* contends that "federal government cash transfers for post-secondary education in Canada, when measured as a proportion of GDP, have declined by 50% between 1992–1993 and 2013–2014" (p. 1). The same report also argues that university spending has grown as much as 205%. Examining the financial sustainability of Canadian universities and colleges, the Canadian Association of University Business Officers (CAUBO) published a discussion paper that reinforces the financial struggle of PSE institutions, pointing out that addressing the increasing diversity of students and their needs further exacerbates financial pressures including "increases in tuition and fees [that have] outpaced increases in Operating grants ... in most provinces" (Snowden, 2015, p.20).

Contemporary Canadian post-secondary institutions have been argued to be increasingly corporatized as an effect of globalization and neoliberalism (Ayers, 2005; Gaertner, 2009; Thornton, 2014; Turk, 2000). The result is a restructuring of post-secondary institutions to accommodate accountability and rationalization, as well as shrinking provincial government operating grants. The ways in which administration, faculty, and staff approach their work has been shifting to emphasize cost-recovery and entrepreneurialism, in essence competing for shrinking resources. However, discriminatory practices that limit some groups, like visible minorities and women, from moving through salary scales and promotions are ongoing (CAUT, 2010; CUPE 2014). Students are treated as "customers" and administration wields greater levels of managerial control (Reimer, 2004). These circumstances privilege "market logic" by "giving priority to efficiency over equity and public service" (Martínez Alemán, 2014, p. 109), offering some explanation for inertia in reducing workplace inequity and a reduction of employee autonomy, a growth in administration, and an increased reliance on precarious workers.

The growth in precarious workers, particularly in the form of hiring adjunct/sessional faculty and "on call" and contract auxiliary staff, is a particularly visible by-product of the growing emphasis of corporatization in higher education. "Reliance on contract faculty ... has been increasing over time, intensifying the 'casualization' of the academic (*and* non-academic) labour force in post-secondary institution" (Foster, 2016, p. 3). Casualization, "undermines employees' identification with an organizational group" (Veenstra, Haslam & Reynolds, 2004, p.510), affecting creativity and engagement in organizational activities. Further, casualization impacts collective bargaining practices.

In a study of privatization of schools, Catlaks (2014) argues that “moving from collective agreements to individualized temporary contracts makes it increasingly difficult to negotiate and bargain collectively, hence, undermining fundamental democratic rights to organize and defend interests collectively” (p. 194). Despite arguments that casualization facilitates greater employer and employee “flexibility” (A *Casual*, 2004), its growing application in higher education clearly puts collective bargaining practices at risk. More importantly, such practices are likely to harm the overall quality of work performed in higher education. This is underscored in the Organization for Economic Cooperation and Development ‘s (OECD) *Employment Outlook* (2016) which notes that “unionisation and collective bargaining more generally facilitate a better deployment of skills in the workplace through its positive effect on workers’ involvement in the firms’ management” (p. 95). This strongly suggests that a healthy and empowered working relationship between administration and employees is not only mutually beneficial but it is also *essential* for broader organizational success.

British Columbia Post-Secondary Context

Like other post-secondary institutions in British Columbia, UFV has experienced a decrease in grant funding from government that is further compounded by restrictions on tuition fees as set by the *BC Tuition Limit Policy*. While notions of financial constraint and accountability are generally understood to be necessary conditions for governments to practice responsible governance, these seemingly “rational” assumptions encourage privatization, decentralization and a shift in the role of the state. There is an ongoing movement in post-secondary education to adopt commercial goals, thus blurring the divide between the academy and industry (Fisher, et al., 2009). This has informed the ways in which provincial governments, like BC’s, respond to changes in national policies and funding through federal transfers.

It is not surprising, then, to see the provinces, including BC, encouraging post-secondary education institutions to find new revenue streams. At UFV, like most other public post-secondary institutions, this has manifested in a bolstering of internationalization programs and partnerships as well as revenue generation through various student ancillary fees. There is a focus on entrepreneurialism in broader institutional strategic goals and in the demand that new programs, services and other proposals respond to the demand to “be innovative, entrepreneurial, and accountable in achieving our goals” (UFV, *Strategic Directions*). Cost recovery alters the way institutions prioritize programs and services, emphasizing growth in areas that may not be purely academic or grounded in benefiting the public sphere. This can be seen, for example, in the ways that new programs, categorized as tuition limit “exclusions,” are developed as cost-recovery. Student affordability becomes secondary to institutions finding ways to generate revenue as a mechanism of making up for government funding shortfalls. Post-secondary institutions have become complicit in the education affordability crisis.

The changing texture of BC post-secondary programming and service delivery has profound effects on its labour force and students. Students experience a substantial increase in debt,² having long-term

² The FSA’s Spring 2017 *30 Drops out of the Bucket* Contest reveals staggering levels of student debt: total student debt from 30 winners: \$2.516 million; average debt among 30 winners: \$83,860; total debt from 223 valid contest

socio-economic consequences for their communities. Collegial governance is de-politicized, creating a false dichotomy between PSE's best interests and those of students and faculty. The growing reliance on precarious contract workers, the development of cost-recovery and revenue generating programs, austerity measures, and even automation chip away at worker autonomy, voice, and workplace health. These pressures are informed by assumptions about the purpose of higher education and the tensions between economic development and social development.

entries: \$7,071,804. See: <http://www.UFV-fsa.ca/2017/04/30-drops-out-of-the-bucket-reveals-shocking-student-debt-loads/>

Internal Contexts

University of the Fraser Valley

Situated within the Fraser Valley, UFV began as Fraser Valley College in 1974 and later became the University College of the Fraser Valley (UCFV) in 1991. In 2008 UCFV became the University of the Fraser Valley. During this 44 year period the student population grew steadily, with recent growth moving from 5,700 full-time equivalent (FTE) students in 2007-08 to 7,157 FTE students in 2015-16 (an increase of 25.56%). This growth is understandable, in part, due to the growing population within the Fraser Valley.

Since the organization became a full university, the Fraser Valley population (Abbotsford, Chilliwack, Harrison, Hope, Kent, Mission, and excluding unincorporated areas) has also grown 8.3% (from 257,797 people in 2008 to 279,375 people in 2016). Further, growth in other UFV feeder areas during this same time frame, including Surrey, Maple Ridge, and Langley, has increased from 640,093 people to 779,291 (21.75%) (BC Stats). BC population projections indicate that the Fraser Valley could reach more than 338,000 people by 2025, suggesting that the need to access higher education will not likely diminish.

The University of the Fraser Valley seeks to provide quality service to students and prominently asserts that it seeks to provide “the best undergraduate education in Canada” (UFV, *About*). To understand how the workplace has shifted at UFV, it is important to look at how services are evolving within the organization. In addition to expansion of various student support areas, there has been significant growth in UFV Development, Marketing, Communications, and International Education.

Measuring growth in some areas is difficult because of the inconsistent manner in which non-program areas report activities. It is advisable that the FSA begin compiling more detailed membership information that can identify membership composition and changes from department to department to ensure that the FSA has a more rounded perspective on institutional composition and work.

Information on programs is more readily available due to required government reporting, and this data clearly indicates that UFV has been quite active in developing more programs of study (see Table 1).

	2007-08	2008-09	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Apprenticeship	3	3	3	3	3	4	4	4	4
Bachelor Degree	17	16	18	18	18	19	19	18	19
Certificate	46	51	55	54	48	53	54	52	59
Developmental	3	4	4	4	4	5	5	5	5
Diploma	35	36	34	33	33	33	31	33	38
Master's Degree	1	1	1	2	2	2	2	2	2

Table 1. Summary of UFV Programs, 2007-2017

Domestic Student Population

Although the domestic student headcount increased only 2.3% between 2007-08 and 2015-16, the student FTE totals have increased by 24.9% in that same time frame (see Table 2). The total student headcounts peaked in 2010-11 at 14,550, declining to 12,873 in 2015-16. The largest change in FTEs

occurred between the 2009-10 and 2010-11 academic years with a growth of 9.4% and with FTE counts remaining higher than 2007-08 levels. This means that more students are taking enough courses to be considered full-time than in the past.

While the impact of student enrolments can greatly impact the working conditions of UFV employees, this must be considered within the framework of other service and scholarship requirements, as well. Further, composition of classes and student needs significantly impact workloads for faculty and staff. For instance, the increase in international students can require staff and faculty to address student issues relating to cultural, social, and language differences that are not easily measured.

International Student Population

There is a significant increase in the numbers of international students attending UFV. Between 2007-08 and 2015-16 there has been a 64% increase in international students. Students at the Chandigarh campus increased 312% between 2008-09 and 2015-16. While this area of growth raises numerous questions about the changing nature of UFV, including its strategic direction, the impact of internationalization has gone largely unexamined at UFV. It is an area that the FSA should turn its attention to as it develops its own strategic direction. Specifically, the manner in which international students are incorporated into domestic UFV classrooms, campus activities, and support services can significantly impact employee work. This can manifest in the ways students receive counselling, advising, registration, language and teaching support.

Year	Student Headcount (Domestic) ³	Student FTE (Domestic) ⁴	Student Headcount (International)	Chandigarh Headcount (International)
2007-2008	12,581	5,729	689	unreported
2008-2009	13,348	6,174	787	59
2009-2010	14,392	6,688	846	65
2010-2011	14,548	7,314	975	50
2011-2012	14,153	7,408	948	73
2012-2013	13,762	7,291	914	89
2013-2014	13,385	7,229	932	91
2014-2015	13,251	7,140	1,053	131
2015-2016	12,873	7,170	1,131	243
% change 2007-2016	2%	25%	64%	312%

Table 2. Student Enrollments 2007-08 – 2015-16

The *National Survey of Student Engagement* (2016) provides helpful contextualizing information about student perceptions of UFV services. In the multi-year report (showing results from 2013 and 2016), for example, there are very moderate changes in student perceptions around their overall experiences.

³ Student numbers as they appear in the UFV annual Factbooks for 2012-13 & 2016-17 and it should be noted that there is some very slight inconsistency in reporting between years 2011-12 and 2016-17 between reports. Students who transfer from Chandigarh to Canada are counted as International.

⁴ Factbooks only began reporting student FTEs by Type in 2011-12. Earlier data extrapolated from different tables.

However, when UFV student satisfaction results are compared, generally, to other Canadian universities, UFV falls well below the NSSE average (calculated on more than 600 institutions) (NSSE survey shows student satisfaction, 2014). This suggests that UFV faces pressure to address student satisfaction gaps as part of its ongoing student engagement and enrollment plans.

The UFV *Strategic Enrolment Management Plan 2014-2019* clearly outlines several objectives that may have significant impact on student composition, institutional direction, and employee work. For example, enrolment goals include: “by 2019 International Student Headcount should increase by 38%” (p. 26), “a 10% increase in co-operative education work placements... at least one validated co-curricular learning activity on the record for 80% of the graduating class; and...a 20% increase in the number of academic programs that offer experiential learning opportunities” (p. 30).

Goals that shift the focus of student learning experiences have implications on how staff and faculty perform their work. For example, increasing focus on providing students with “experiential” learning opportunities requires UFV employees to support student needs differently from more traditional academic work. Field placements require significant attention to risk management documentation, policy language, community partnerships, and student support systems that impact staff and faculty workloads differently from more traditional academic program structuring. For such changes to be effective in creating positive experiences for students, staff and faculty require significant engagement in planning and implementation processes to ensure that there are adequate resources to support such work.

Members of the Faculty and Staff Association deliver the vast majority of services available to students at UFV. It is crucial that these members are able to inform organizational processes to ensure success for students. This requires an engaged and empowered membership that can actively work with the Employer on issues that shape both individual student experience and UFV’s relationship to its community. As such, the FSA is an important stakeholder within UFV.

The UFV Faculty and Staff Association

The FSA’s primary responsibilities are to steward the collective agreement held between the FSA and UFV and work towards improving the working conditions of its members. In the spring of 2017, membership approved the adoption of FSA core values, mission statement and five year strategic plan. The FSA executive is hopeful that these measures will assist the organization in establishing a transparent and effective continuity for bargaining, contract administration and member engagement.

Membership Composition

The FSA membership uniquely encompasses faculty and university support staff. Within these categories, there are a diverse range of employee types and working conditions. The distinctions between faculty and staff can often be significant, encompassing different hiring practices, workload assignments, salaries, and roles in governance. The incredibly varied experience of members has been a source of both strength and tension for the FSA. The 2002 *FSA Task Force on Restructuring Memo* highlights the ongoing tensions among different member constituencies but, ultimately, asserts that a

united voice has greater strength in holding the Employer to account. Interestingly, the structure of the FSA executive (discussed later) has staff and faculty-specific positions that may actually exacerbate difference. Established, presumably, to highlight constituency-based special interests but having no specific political direction, these particular roles pull representatives away from *shared* workplace interests. The nuances of different constituencies (and there are many) may be addressed by taking a more decentralized approach to communications and representation that is explored in the Recommendations section of this document.

The FSA membership has grown by 36% between 2007-08 and 2015-16. In 2010-11, the FSA membership reflected its largest growth of 18% but experienced a dip between 2013-14 and 2015-16 and an increase, once again, in 2016-17 (see Table 3).

Year	FTE FSA Members
2007-08	758
2008-09	774
2009-10	797
2010-11	832
2011-12	825
2012-13	844
2013-14	836
2014-15	830
2015-16	834
% change from 2007-08 to 2015-16	10%

Table 3. FSA Membership Numbers⁵

During the 2007-08 to 2015-16 span of years, the FSA growth was 11.4% greater than student FTE growth. It is likely that this difference was informed, in part, due to the growth of auxiliary workers, shrinking government grants (forcing the employer to seek out revenue-generating activities), and massive changes to government accountability and reporting. More staff is required to support accountability and revenue-generating activities and auxiliary and sessional employees offer the employer a significant cost savings. In addition, it can “buy time” when managing shifting finances, providing stop-gap measures for positions that have indeterminate futures.

The trend towards precarious work is noteworthy. For example, in 2007-08, when UFV became a full university, there were only 35 part time/non-permanent staff. By 2015-16 this number grew to 122. The number of “part time” instructional faculty changed from 250 in 2007-08 to 370 in 2015-16. Some forms of precarious work, such as the introduction of Limited Term Appointments (LTAs) in the 2012-14 Collective Agreement, warrant close examination and study. Unlike sessional faculty, LTAs enjoy up to two years of stable employment at UFV but receive compensation that is only marginally better than

⁵ Faculty and Staff FTE from Human Resource Database (HRDB) maintained by Post-Secondary Educators Association (PSEA). Rounded to the nearest whole number.

sessional work. As recognized FSA members, LTAs and Type D employees have less stable attachments to the organization, making the FSA membership totals presented in Table 3 somewhat misleading; many of FSA members are not enjoying the full benefits of regular employment.

This review reveals a pressing need for the FSA office to track membership data more comprehensively. For example, month-to-month membership actually fluctuates significantly. Understanding how membership changes on a regular basis can equip the FSA with a greater understanding of how the Employer reconstitutes the workplace. Intentionally examining such data can assist the executive in monitoring employment trends to support a range of FSA work including bargaining and organizational planning.

Human resource information from the Employer has traditionally been supplied in print form. Unlike the Employer, data has not been collected in digital format or stored in a database, leading to a very uneven and limited amount of information about FSA members.

In addition to a need for enhanced data collection, FSA executive members need to regularly report representative work on various UFV committees (including OH&S, JCAC, and JPDC) with greater granularity. Doing so will complement raw membership data in ways that can assist the FSA, including building a greater understanding of how job classifications (and pay grades) may be changing, how changing processes and procedures constrain access to professional development funds, and how occupational health and safety issues arise.

Year	Excluded Employees ⁶	Excluded Permanent	FTE Excluded (HRDB)	Total Staff ⁷	Total Staff (permanent) ⁸	Staff FTE (HRDB)	Total Faculty ⁹	Total Faculty (permanent)	Faculty FTE (HRDB)
2007-2008	63 ¹⁰	35 ¹¹	34.2	400	365	317.84	617	351 ¹²	440
2008-2009	61	39	37.2	417	252	328.68	625	375	445
2009-2010		42	42.3			334.65			463
2010-2011		48	48.7			353.43			478
2011-2012	154	56	65.71	517	371	362.1	758	365	463
2012-2013	168	80	76.36	489	385	365.1	757	367	478
2013-2014	192	77	75.68	490	374	361.43	760	372	474
2014-2015	189	79	77.99	468	358	358.2	754	378	472
2015-2016	178	80	78.47	480	358	358.99	744	374	475
% change in FTE 2007-2016			129.4%			12.9%			8%

Table 4. FSA Membership Composition¹³

⁶ Excluded employees include permanent, non-permanent, and temporary non-bargaining employees, including directors and those in continuing studies.

⁷ Includes full-time, part-time, and non-permanent. Detailed breakdown of employee type is only available from 2011-12 and onwards. This total will include CE employee, “contracted” and “hourly” employees.

⁸ Only “permanent staff” as it appears in the Factbook is considered (e.g., page 40 for 2011-12).

⁹ Includes academic support, full-time and part-time faculty as reported in the Factbook (e.g., page 40 of 2011-12 Factbook).

¹⁰ 2007 data from the Factbook differs from subsequent years, reporting excluded employees as “administration.”

¹¹ FPSE. (May 2015). *BC’s post secondary education administrative growth study: Unregulated increases during the Campbell-Clark government.*

¹² 2007-08 and 2008-09 Factbooks do not break down non-permanent and permanent part time faculty or staff.

¹³ Data taken from UFV Factbooks; no factbook was available for highlighted years.

	Members		FSA Dues	
	2007-08	2015-16	2007-08	2015-16
FACULTY				
AF (Adjunct Faculty)	1	-	\$399	-
AH (AC Asst/Ed Adv Non-Reg Hourly)	3	0	\$1,186	\$190
AS (Asst/Ed Advisor Salaried Perm)	19	18	\$11,181	\$16,598
CE (Continuing Education)	13	-	\$6,149	-
CO (Continuing Education)	4	4	\$657	\$2,419
DS (Director Salaried Perm)	18	11	\$13,411	\$14,954
FH (Faculty Hourly)	61	27	\$19,450	\$20,576
FN (Faculty Salary Non-Regularized)	1	-	\$542	-
FR	1	-	\$194	-
FS (Faculty)	311	313	\$257,299	\$382,796
FT (Sessional)	213	165	\$71,969	\$96,705
NF (Non-Teaching Faculty)	19	22	\$14,332	\$23,160
NH (Non-Teaching Hourly)	1	2	\$94	\$349
NR (Non-Teaching Faculty Salaried)	-	1	-	\$1,078
OS (Other UFV, Non-Bargaining Hrly)	1	-	\$146	-
STAFF				
EN (Exempt Salaried Non-Permanent)	3	-	\$1,884	-
ES (Exempt Salaried Permanent)	38	-	\$32,796	-
OH (Other Staff Hourly)	3	-	\$502	-
SD	2	-	\$1,583	-
SH (Staff Hourly)	42	49	\$10,570	\$19,635
SN (Staff Salaried Non-Regularized)	1	-	\$5	-
SR (Staff Salaried Non-Permanent)	5	13	\$1,464	\$8,360
SS (Staff Salaried Permanent)	317	327	\$159,535	\$239,152
ST (Student Employee Hourly)	1	-	\$98	-
Total	1,074	951	\$605,376	\$825,971

11% decrease

36% increase

Table 5. FSA Membership by Classification, 2007-08 and 2015-16¹⁴

FSA dues have been stable for more than 15 years. Changes in dues (see Table 5), are the result in changes in membership composition and wage increases (dues are calculated as 1.5% of income). When compared to the UFV Factbook data (see Table 4), it is clear that the ways in which employees are defined varies. The FSA needs to work with the Employer to determine how the FSA will define its membership and ensure data continuity. Currently, the UFV-FSA pays the lowest dues in FPSE. The current situation allows for the FSA to sustain itself but leaves no financial resources for implementing structural change.

¹⁴ Data provided by UFV Human Resources.

A lack of complete reporting to the FSA from UFV on excluded employees is also worth noting. Table 4 shows a significant growth in the numbers of excluded employees and, despite the requirement that these positions are mutually agreed upon in Article 2.1c) of the Collective Agreement, there is little evidence that this has occurred. The justification for added excluded positions is not well understood because the FSA has not been given opportunity to consider whether such positions should be excluded. Consequently, there may be lost revenue opportunities for the FSA as well as opportunities to support and represent other UFV workers. This is important to note because these positions have significant cost implications for the institution. For example, between 2002 and 2016, excluded employee costs shifted from 2.25 million dollars to 10.2million dollars (FPSE, May 2016).

Membership Survey

In the spring of 2017, the FSA conducted a Membership Survey (see Appendix D) as part of the review process. This survey was designed to a) gain a sense of membership knowledge about basic FSA services, and b) provide members with information about FSA services. The results indicate that the role of the FSA and aspects of the work it performs is not completely understood or visible to the broad membership.

There were 292 respondents out of a possible 1,161 invitees. Of these respondents, 46% were Staff (Type A), 34% were Faculty (Type B teaching), 4% were Staff (Type C), 2% were Staff (Type D), 9% were Faculty (Sessional), 2% were Academic Support Faculty (except advisors), 1% were Academic Advisors, and 1% were Directors. Length of service by members indicates that 26% of all respondents are “new” (0-5 years) to UFV. Another 26% have served at UFV for 6-10 years, 21% have been at UFV 11-15 years, 10% have served for 16-20 years, and 18% have served at UFV for more than 20 years. Interestingly, the vast majority of “newer” employees are permanent staff and sessional faculty. The majority of type “B” faculty have 11-15 years of service (30%) or 20 plus years of service (26%). There are many fewer Tybe B faculty employees with less than 5 years of service (10%) as compared to sessional faculty (46%), illustrating the ways contract work informs workforce composition. Studies of this kind have not been performed regularly, making it difficult for the Association to monitor change and inform planning.

Because the FSA is a volunteer-based organization, membership engagement should include interest in service work with the FSA. Enhanced engagement with general membership creates low-key opportunities for members to participate in service work that can lead to improved knowledge and experience, better membership service, and a mechanism to nurture new leaders. However, the survey suggests that there is a great deal of work to be done in creating a climate where members have a more active interest in FSA work. For example, when asked “Have you ever considered serving on the union executive?” 72% of respondents said “no” and, of those, 24% indicate that they have little time for such contributions. 34% of those surveyed have never attended an Annual General Meeting. This, too, suggests that the FSA has some significant member engagement work to undertake if the Association is to improve communications with members.

Other issues that manifest through the survey include member satisfaction with the FSA’s performance in protecting member interests. For example, when asked, “What is your single largest concern about

your working conditions?” about 28% of respondents highlighted workload as an issue. When asked, “Have you ever had an issue relating to a workplace injustice?” 44% of respondents selected “yes” and of those respondents, 54% indicated that their matter was not resolved. While issues can be deeply personal and unique, these figures suggest the FSA could be improving its effectiveness in dealing with workplace problems. Further, the volume of reported workplace injustices is concerning. To understand the depth and scope of these issues, there is a strong need for more intentional and regular studies of membership.

There are not many tools to accurately gauge workload issues, particularly with staff, because there is so much diversity within this constituency. More regular research has been done on faculty workloads. For example, in 2016, UFV participated in the *Faculty Survey of Student Engagement*. The results of this survey indicate that, on average, faculty work about 42.1 hours per week. This exceeds workload expectations in the UFV-FSA Collective Agreement by 7.1 hours per week and provides tangible evidence of time and workload complaints reported by this constituency.

Whether members are aware of the FSA’s obligations as a union, the Membership Survey indicates that members support the fundamental objectives of the FSA. Members indicate important/very important ratings on: upholding rights as an employee, advocating for retirement benefits, advocating for health/extended care benefits, protecting wages, ensuring job security, ensuring equal compensation for equal work, engaging with other affiliated labour organizations, ensuring members can effectively participate in UFV governance, and ensuring the workplace is safe and healthy. The challenge, then, is finding ways to encourage and incorporate better membership involvement in the pursuit of these objectives. There is an apparent disconnect between membership’s willingness to participate in union specific-activities and the importance they place on their union for protecting workplace conditions. Again, as a volunteer organization, the FSA depends on its engagement from membership for its overall success and needs to consider the implications of limited engagement.

Formal FSA Communications with Membership

The FSA executive communicates its activities to members through several key tools: the FSA newsletter, *Words & Vision*; the *FSA Annual Report*; email bulletins; and *Discourse*, a discussion forum platform. These platforms serve as a critical mechanism for engaging members and mobilizing action.

While bulletins operate as a one-way communication device, it is concerning that the newsletter and the discussion forums do not embody greater contributions from a diverse range of members. For example, contributions to the newsletter from non-executive members have dwindled over the years. Eighty percent of respondents in the Membership Survey did not feel strongly enough about an issue to contribute to the FSA newsletter. Launched in 2016, *Discourse*, has the participation of about 17% of total membership. Although there is clearly room for improving member involvement in using these tools, decentralized methods of communication may also enhance opportunities for members to converse about workplace issues.

For example, socializing is a method of strengthening relationships between members and reducing feelings of isolation. The FSA supports social development in its budget and through the position of Social Committee Chair. Providing space for members to connect without specific objectives is critical to the formation of a supportive and engaged workforce (see sources like the National Quality Institute's "Healthy Workplace Model"). Specifically, if members are encouraged to share information, particularly about their workplace, the FSA can assist in strengthening members' general sense of empowerment and control over workplace health and well-being. This requires further FSA development of dispersed and informal networks that are supported by Stewards and other at-large representatives.

The augmentation of formal FSA communications with informal relationship development among members can also establish better methods of educating members about specific FSA issues and broader community-based labour concerns. The FSA is not only a stakeholder and member of the UFV community; it is a member of the local geographic community. Communications with other stakeholder groups, for example, offer greater opportunities for the FSA to assert its influence and role within the local and more regional movements supporting organized labour and social justice. Indeed, "to engage in deep relationships with community organizations requires a more open union practice, where unions develop and support delegate and steward involvement in coalition practice and where a social vision is embraced (Tattersall, 2006). A key member of the very local community is the UFV Student Union Society.

Student Union Society

Like the FSA, the UFV Student Union Society (SUS) is an important stakeholder group at UFV. The UFV Student Union Society is in the process of an internal reorganization, enacting a strategic plan to assert itself as an autonomous stakeholder at UFV. This endeavor is multi-faceted and involves restructuring financial priorities and involvement in UFV activities that better align with the SUS goal to reassert students as the expert voice in student needs. In January of 2016, the SUS hired a new executive director to provide administrative continuity.

Presently, the FSA does not have any formal relationship with the UFV Student Union Society. Communication between these two organizations has been limited in recent years. In addition to restricting joint action on certain issues, this lack of communication may also contribute to tensions between some members of both groups. For example, the SUS executive's efforts in setting financial and political boundaries may result in organizational changes that affect the way FSA members work with SUS sanctioned student groups. There are some issues that may be of mutual interest to both the FSA and SUS may be of mutual interest. Without regular communications, the two organizations may be at risk of working at cross-purposes instead of collaboratively. Stronger lines of communication could potentially strengthen respective stakeholder positions by providing greater role clarity and minimize misinformation. Some resources should be focused on relationship building with SUS representatives.

Federation of Post-Secondary Educators

The FSA is a member of the Federation of Post-Secondary Educators (FPSE) and has been a member since 1982. Dues are assessed based on the size of the FSA's membership. Over the years, the FSA membership has regularly raised questions about the value of FPSE membership.

There is little evidence available to suggest that there has been a detailed and reflective analysis of what it means to the FSA to retain membership with FPSE within the last 15 years. The following discussion provides information about the benefits offered by FPSE and an exploration of perceived challenges of the FSA's ongoing membership.

Regardless of what local membership may wish UFV to be as an organization, UFV is constrained by the broader BC post-secondary framework and, most significantly, by a legislative mandate. Although there is a need for more specific research into the effectiveness of coalitions, they are typically sought out in order to "overcome structural disadvantages" (Dixon & Martin, 2012, p. 263). Further, aligning with other, like-minded labour organizations offers opportunities to "engage more strategically in political and other activities to revive organized labor" (Simmons & Harding, 2009, p. 103). This speaks to a commitment by the FSA to participate in the broader social commitment that acknowledges that "public workers' struggles help determine the quality of life and what is thought of as the public interest" (Simmons & Harding, 2009, p. 105).

The product of this examination suggests that the FSA has a responsibility to its membership to continue its participation in FPSE as a way of ensuring that FSA members have the best access available to alliances with other PSE institutions, information, training, and professional expertise. Further, the FSA membership must consider, as a labour organization within a higher education context, its role as a participant in local labour movements and its responsibility to the community in which it is situated.

The 2017 Membership Survey indicates that 38% of members are interested in knowing more about FPSE. In ensuring that this relationship is beneficial to the FSA, the FSA executive should have regular access to information about the ways the Association interacts with the Federation and how these interactions inform local FSA practice. For example, the FSA should track the number of FPSE meetings that FSA representatives attend. The FSA should also receive an annual summary of legal costs charged to the FSA file for the handling of labour disputes and regular (perhaps annual) reports should be made to the FSA membership on FSA-FPSE activities.

FPSE dues totals (see Table 6) are calculated on an April 1 to March 31 financial year:

Year	# Members	FPSE Dues
2007-08	733	\$283,901
2008-09	800	\$301,114
2009-10	848	\$330,324
2010-11	1,001	\$343,231
2011-12	1,012	\$342,860
2012-13	1,039	\$353,045

2013-14	1,030	\$366,314
2014-15	1,000	\$366,521
2015-16	999	\$365,341
2016-17	1,014	TBD

Table 6. FPSE Membership Dues

Challenges to FPSE Membership

Minutes from a 2014 FSA Finance and Administration Committee meeting discuss an informal exploration of an FPSE withdrawal, outlining concerns like cost and the dangers of outsider influence. Bargaining notes from 2013 reveal a notable absence of FPSE staff representation during negotiations. The failure to ratify the proposed agreement raises important questions around what it means to exclude professional expertise. When comparing the FSA to other FPSE member organizations, it is highly unusual to not utilize the support of FPSE staff in bargaining. Based on available documentation, two main concerns about FPSE membership emerge:

1. With fees averaging around \$350,000 per year, there is curiosity around membership cost effectiveness. While this amount of money appears substantial, the costs of training, networking activities, legal representation, and other expenses that FSA executive members would require are equally substantial. The question of membership was investigated in 2002 and again, more loosely, in 2014. In 2014, the options of hiring labour lawyers to work for the FSA or hiring a labour lawyer on retainer were discussed but no further action was made.

Having to pay on a pay-per-use basis for legal and labour support can create a situation where workplace problems and injustices are *weighed against the cost of representation*. For example, if there was a year where successive conflicts arose with management, the FSA may not have a budget to address all issues. The FSA executive would then be exposed to a struggle of affordability that could interfere with decisions to pursue grievances.

Further, the constantly changing composition of FSA executive members creates a space for greater inconsistency in how workplace injustices are pursued. The 2017 Membership Survey reveals that many workers (58% of Faculty B and 27% of Staff Type A, for example) feel their workplace conditions are deteriorating. While there are a range of reasons for this, it is unclear how moving away from the broader labour support of FPSE would assist in addressing such problems, particularly when the only other available options centre around contracting legal assistance on a case-by-case basis.

The FSA would also be burdened with seeking out education/training opportunities, networking, and information gathering on its own. The growing complexity of post-secondary education in Canada (and beyond) suggests that more training and development is required of union representatives if they are to successfully navigate this rapidly changing sector. There is no other comparable association/federation that offers equivalent supports. Indeed, FPSE membership even offers the FSA access to other post-secondary education labour groups (i.e., CAUT and CUFA), eliminating the need for additional individual memberships.

2. Some members feel that FPSE aligns the FSA with the wrong “type” of post-secondary institutions. The pursuit of a rank and tenure process at UFV is part of a movement to reproduce working conditions (including the evaluation of work) similar to traditional research universities. The challenge of taking the teaching workforce in this direction is substantial and no other institutions in FPSE have pursued this, with the exception of Thompson Rivers University and Emily Carr University of Art & Design (which has assigned Rank, but not tenure). Rank and Tenure at UFV is even further complicated by the Ministry of Advanced Education’s clear mandate that while UFV is free to pursue Rank and Tenure, the Ministry will not provide any additional resources to UFV, including provisions to offer expanded financial compensation to those moving through ranked positions.

Membership in FPSE aligns with how UFV is legislated to govern. The FSA’s role is to serve membership within the current labour and post-secondary context and the Association has no influence over the kind of institution we are legislated to be. While some FSA members may be interested in a workplace that resembles larger research institutions like SFU and UBC, UFV remains constrained by the *University Act*, as a “special purpose, teaching university” (note that Thompson Rivers University lives under its very own act, the *Thompson Rivers University Act*). BC research universities (e.g., UBC, UVIC, SFU, Royal Roads and UNBC) operate under a different legislative mandate and their respective faculty unions have different historical roots as professional associations. Unlike the nineteen BC college, university, and institute trade unions that FPSE represents, these research institutions belong to an umbrella organization known as the Confederation of University Faculty Associations (CUFA). The SFU Faculty Association is their newest member, having only very recently unionized. Although there are definite similarities between CUFA and FPSE, the UFV FSA is ideally served by FPSE because of its connection to those institutions that are mandated by government to be teaching focused and share similar histories as open-access community colleges.

Benefits of Membership

1. **Participation in Wider Provincial Labour Discourse.** Belonging to a larger regional federation provides FSA executive members the opportunity to participate in discussions and activities that inform the labour experiences of post-secondary institutions that are similar to UFV. This includes funding and media coverage for special projects that address post-secondary education and related labour and social concerns. Two recent examples of such participation are the *30 Drops out of the Bucket* and *Open the Doors* campaigns.

Member interest in such activity is reflected in the 2017 Membership Survey where UFV members were asked to rate their interest:

“On a scale from not important (1) to very important (5), how important is the FSA’s role in engaging with other affiliated labour organizations)?”

The average response of “important” (4 out of 5) aligns with other responses to FSA priorities including safe and healthy work environments, pay equity, and participation in governance. Such a survey result affirms the importance of the FSA’s role in broader labour-related activity.

2. **Increased Access to Labour Ally Support.** The resources of the Employer are both significantly greater and more consistent than the FSA. Having the support of the Federation and its network provides the FSA with access to greater capital (e.g., FPSE’s Defence Fund), legal support/expertise, and social capital. Being networked with other labour organizations including unions similar to UFV and associations like the Canadian Association of University Teachers, provides the FSA with the collective “weight” of other, often more powerful, organizations.
3. **Access to FPSE Legal Support.** FPSE employs legal counsel which the FSA has access to for general legal information as well as matters that escalate to mediation and arbitration. This counsel is available upon approval of FPSE. The following table illustrates the annual legal expenditures by FPSE on UFV matters since 2011-12:

Legal expenditures incurred by UFV-FSA by year:

2011-12.....	\$19,000
2012-13.....	\$3,800
2013-14.....	\$25,000
2014-15.....	\$500
2015-16.....	\$500
2016-17.....	\$47,000

4. **Access to FPSE Labour Support.** The FSA is assigned a labour relations staff representative to support the FSA in matters relating to supporting the Collective Agreement and bargaining. FPSE staff representatives will attend meetings on site, as needed, at no additional cost to members.
5. **Access to FPSE Defence Fund.** As of August 2017, this fund was at \$8.25 million. This fund provides strike pay and other financial support for job action.
6. **Training and Development for Local Representatives.** FPSE offers a number of different educational opportunities for local unions. Because members of the FSA are elected with relatively short terms of service, often with no labour knowledge and experience, this training provides FSA representatives with core knowledge necessary to perform their roles.

As part of and in addition to FPSE’s *Labour Relations and Public Advocacy Certificate*, representatives from union locals can take courses in:

- Steward Training, Basic
- Collective Bargaining, Basic
- Job Action, Basic
- Advocacy
- Collegial Authority

- Disability Management
- Effective Meetings
- Effective Political Action
- Effective Union Executive
- Governance
- Job Action
- Layoffs
- Leadership
- Member-to-Member Conflict
- Working with the Media

FPSE Staff representatives will also come to UFV to deliver training on premises. One example of this is Steward Training for provided to all Shop Stewards.

7. **Financial Support for Local Presidents.** This covers the FSA President's costs to participate and represent the FSA in Federation activities including President's Council and President Retreats.
8. **Financial Support for Other Local Representatives.** The FSA has several FPSE positions on the FSA executive: Human Rights & International Solidarity, Non-Regular Employees, and the Status of Women. These representatives attend FPSE meetings up to two times per year.

FPSE supports the work of these representatives by paying for the costs of accommodation, transportation, meals and childcare to attend FPSE meetings. Further, involvement with FPSE provides these representatives with additional information and networking support that inform local FSA endeavors.

9. **Financial Support to Attend FPSE AGM.** In addition to participating as members of FPSE and attending to business arising from this membership, these AGMs offer FSA delegates access to training and development workshops relating to labour issues.
10. **Financial Support for FSA Delegates to Attend Member Training and Conferences related to the Federation.** There are a wide range of activities that FPSE is affiliated with, extending opportunities for FSA representatives by financially supporting attendance. Activities include, the BC Federation of Labour Annual Convention, CAUT Aboriginal Women's Conference, CAUT Librarians and Archivists Conference, Harry Crowe Foundation Conference, the tri-annual Canadian Labour Congress Convention, and numerous others.
11. **Discounts for FPSE members.** Individual members of FPSE can participate in CAUT's affinity programs which offer discounted rates on credit cards, mortgages, insurance, office products, and car rentals.

FPSE members also have an opportunity to participate in the Canadian Education Exchange Foundation (CEEF), a non-profit organization that facilitates one-year work exchanges with an educator in another country.

Because FPSE does not have the infrastructure to job cost the use of their staff, when supporting its members, it is difficult to conduct a detailed cost-benefit analysis of FPSE membership. However, there is strong qualitative evidence to suggest that the benefits of membership are noteworthy and FPSE has indicated that the FSA, for many years, did not take full advantage of all that they have to offer. It is also helpful to consider that FPSE offers a kind of “insurance policy” to FSA members by informing the Employer that the FSA has access to a much wider network of financial support and labour expertise, even when FSA executive membership changes. Further, the cost of rectifying workplace injustices and disputes do not have to be weighed against the FSA’s local budget. FPSE membership guarantees expert legal and labour support, should the FSA choose to request it.

FSA Office Support

The FSA office has two permanent CUPE 1004 positions (see Appendix I).

- **FSA Administrative Assistant, Procedures & Liaison (0.9 FTE)**
Under the general direction of the President, facilitates the effective operation of the FSA office; provides administrative assistance to the President, and administrative-secretarial support to FSA executive members where necessary.
- **FSA Administrative Assistant - Financial (0.6 FTE)**
Provides support to the Secretary-Treasurer and President by handling accounting and financial responsibilities of the Association and assisting with the preparation of the annual budget, the purchase of major equipment and software, and the annual review.

There is an important balance between the electoral powers of the FSA and the staff who carry out the work generated by the executive. The FSA Administrative Assistant, Procedures & Liaison reports to the President and the Administrative Assistant - Financial reports to both the President and the Secretary-Treasurer. These two positions are critical to the consistent operations of the FSA office. With the unpredictability and frequent transitions of FSA executive positions, these positions provide important continuity in file management, procedures, and institutional memory. Staff also fill in for one another during absences, necessitating ongoing cross-training.

As part of the review process, staff were asked for feedback on their respective positions and asked to highlight areas where operations can be more efficient and effective.

- ***Establish Clear Boundaries:*** At times, FSA executive members treat staff as their own personal support system, asking staff to perform work at their behest. This can include requests to call meetings, collect information, and other “busy-work” that are not part of the staff’s normal duties. Members of the executive need to be reminded that the FSA staff report to the President and/or the

Secretary-Treasurer. Members of the executive should be discouraged from involving staff in inter-executive politics.

- *Introduce Staff Performance Appraisals:* Regular communication and feedback regarding job duties and performance can provide a constructive mechanism for staff to communicate concerns and interests while ensuring that work aligns with the strategic direction of the Association. Changes, like increased efforts in member engagement, can lead to changes in work performed by staff that should be documented to ensure support. Further, appraisals offer more intentional opportunities for staff to express needs and interests that can inform professional development.
- *Update Job Descriptions:* The changing needs of the Association have triggered some changes to the work performed by staff. This includes enhanced focus on records management as well as providing administrative oversight of many FSA tools including the website, *Discourse* (the discussion forum membership tool), and social media.
- *Continue Development of Records Management Processes:* Beginning with document management, the FSA office requires further streamlining of digitized document management systems to ensure that there is less reliance on staff to serve as the “organizational archives.” This will impact the responsibilities of the FSA Administrative Assistant, Procedures & Liaison position by changing records management processes and procedures.

Records Management

To support the work of the FSA office and provide greater clarity on the organizational institutional memory of the Association, a records manager was hired on a short-term contract in 2017 to assess the FSA’s records management needs. A full report on the status of this project can be found in Appendix J. In addition to digitizing the Association’s newsletter, auditing FSA information security, and initiating a records control software system, this project has also identified areas in need of continued attention. The simple processes of managing FSA-related documents, including their creation and identification, require significant attention from the FSA executive.

FSA executive members create a range of documents during their terms with the FSA that include reports and documentation around member issues. Documentation regarding executive activities is often sporadically provided to the office. This is problematic for many reasons, including the difficulty in mentoring new representatives when past members are not available to provide information about their roles. This can include information regarding specific projects, such as time, costs, contacts and more. Other information relating to member issues, formal or informal, is also very critical to informing bargaining plans, strategic plans, and general work assignments. Without a clear records management plan, it is difficult for the executive members to know what information should be communicated to the FSA office.

The records manager has identified a number of specific issues around the development of a records management plan that is greatly informed by the FSA’s current decentralized executive structure. Positions like those of the VPs are defined by the constituencies they represent rather than representing specific political or operational objectives, creating tremendous variety in the ways in which these roles

generate records. Further, there is no clear document management or reporting system to ensure that executive activities are, at the very least, documented to assist with planning. Over recent years, reports to the executive and to the President have become less detailed. This is particularly evident in reporting from the Contract Administrators whose fully-released work generates a substantial amount of documentation. This gap in information sharing and reporting hampers the FSA's ability to ensure consistency, accountability, and effectiveness in serving members.

Developing a records management system, in which documents relating to member issues are documented, recorded and retrieved, creates an improved opportunity for informed planning. There is also a need for more fully developed records requirements for other executive members, specifically those serving as co-chairs and Vice-presidents. In this way, trends, emerging issues, and activities can be collected and centrally preserved for the purposes of generating better strategic and bargaining plans. Further, such record-keeping would improve information flow between changing representatives. However, it is essential that records management expectations are clearly articulated to executive members and there is regular follow-up to ensure compliance. Such expectations must be built into FSA executive job descriptions.

FSA Executive Member Positions

The ways in which union executives are organized vary from organization to organization. A review of FSA executive positions reveal several concerns that affect the overall effectiveness of these positions and the work assigned within these positions. These concerns are informed by the unique composition of FSA membership that includes Type A, C, and D Staff, Type B Faculty, Sessional Faculty, LTAs, Directors, Academic Support Faculty and a subset of other groups that are not formally recognized within the Collective Agreement. Within many of these categories are even greater nuanced differences. This results in a union that must represent people with very different perspectives, workloads, hiring practices, and evaluation processes. Since UFV's transition to a university, the FSA and its membership have faced even greater pressures that are largely informed by UFV's structural reorganization and a shifting post-secondary landscape.

This portion of the review provides a constructive discussion of how the FSA manages its work in relation to executive positions and highlights areas where this work can be improved by considering other structural options. Much of the preliminary work is included in Appendix G: FSA Executive Positions, where each position is broken out and discussed. An analysis of executive positions draws on data from a variety of sources, including the FSA Constitution & Bylaws, the 2017 Membership Survey (Appendix D: 2017 FSA Membership Survey Results Summary), a survey of executive members (Appendix E: FSA Executive Survey), and FSA records. This information was analyzed to examine workloads, duties/responsibilities, resource allocation, power relations, communication, and general work practice. The results of this effort highlight numerous issues that are addressed through a variety of recommendations. These recommendations contextualize the FSA executive's work as both complicated and evolving. They offer suggestions as to how the union can better allocate its resources to address the issues highlighted in the Membership Survey and noted by executive members themselves.

The Primary Work of the Executive

The fundamental purpose of the FSA Executive is to uphold the collective agreement and work towards creating better (healthier and well-compensated) working conditions for members. Applying this lens in examining executive roles offers a necessary focus to address issues of efficiency and effectiveness. This is a pressing concern illustrated by the 2017 Membership Survey, which strongly indicates that members need greater support from the FSA. For example, results show that 58% of faculty and 27% of staff feel their working conditions are deteriorating. Furthermore, 56% of respondents experienced a workplace injustice and, of those, 54% did not feel that the matter was satisfactorily resolved.

The current executive structure is constructed to offer distinct positions that represent certain constituencies (i.e., staff, faculty, and non-regular employees). However, these constituent representatives are elected by the whole of the membership. This means that all staff, faculty and non-regular employees elect staff, faculty and non-regular representatives. The 2017 Membership Survey suggests that this may not represent the will of the membership. When asked, "Do you think that some

executive positions should be elected only the groups they represent?” 51.23% said “yes” (24% had no opinion). Although the FSA is extremely unique in its inclusion of both faculty and staff, serving different constituencies is not unique to unions. The underlying rationale is that these representatives can specifically represent issues of those constituencies because they are both tasked to do so and, presumably, have important knowledge about the group they represent. The effect, however, is concerning in that building in “difference” has, from time to time, had a divisive effect in how the executive functions. This is further complicated by the fact that all constituents, across the membership, elect these representatives.

Defending the Collective Agreement

A key focus of a labour union is to defend the rights and working conditions of workers that are established within the written formal agreement made between the union and the employer. At UFV, there is substantial evidence within historical Letters of Agreement (LOAs) and Memoranda of Agreements (MOAs) that the Agreements Committee and Agreements Chair have been used to deal with substantial problems (e.g., secondary pay scales and workload issues) outside of bargaining. This shifts the responsibility of bargaining to smaller groups of people. Further, many of these historical agreements have not been ratified, much less reviewed, by broader membership. There have even been incidents where the FSA Executive has not approved agreements before they have been signed. This is an incredibly risky practice that has actually resulted in harm to members. Furthermore, LOAs and MOAs create high member expectations that problems *will* be solved. However, the results of many of these LOAs and MOAs have been unsatisfactory, pushing problems on and on, rather than using MOAs and LOAs to mitigate *emergent* problems from bargained agreements (i.e., managing unexpected consequences). One example is an LOA in the current agreement (2014-2019) on science laboratory faculty. This significant area of ongoing concern was presented by the FSA in bargaining only to be converted to an LOA. Not only is this an untidy method of handling disputes, it undermines the real bargaining process by enabling issues to be essentially “tabled.”

LAM – Labour and Management

Emergent issues in the workplace are mandated by provincial law to be handled by Labour and Management meetings (LAM). LAM is mandated by the *Labour Relations Code of British Columbia*. However, the UFV/FSA contract has a somewhat unusual article (32), calling for an Agreements Committee that is separate from LAM. This article dates back more than 19 years and is not replicated in any other locals within FPSE. This committee is redundant and unnecessarily complicates the workplace problem solving process.

Essentially, the Agreements Committee is tasked, in Article 32 of the Collective Agreement to:

discuss and make recommendations on:

- (i) problems of Agreement interpretation;
- (ii) matters of employer-Human Resources arising out of this Agreement;
- (iii) amendments to the current Agreement;

- (iv) policy matters under consideration by the Employer which may be in conflict with the Agreement.

Under *Joint Consultation* in Section 53 (2) of the BC Labour Code (<http://www.lrb.bc.ca/code/#section53>):

The consultation committee provision must provide that the parties consult regularly during the term of the agreement about issues relating to the workplace that affect the parties or any employee bound by the agreement.

Most unions advise that this particular labour-management work be carefully delegated. The union team, a focused group of elected members, must be high functioning, collegial, and willing to operate in careful unison. Much of the work that occurs at LAM meetings is focused on the broader issues of labour and management concerns and is a place where emerging issues can be negotiated and addressed. This is a political job that must be overseen by the FSA President and there must be some flexibility in which executives participate that will be contingent on the nature of labour-management concerns.

Labour relations expert Mark Alexander (1999) underscores the importance of relationship building for LAM as a way of conducting joint problem solving. Much of the FSA's LAM experience has been a clear lack of interest from management to even acknowledge problems. To get past this, Alexander (1999) suggests:

- increasing the chance for the parties to get together away from traditional issues;
- increasing communications and information sharing that is particularly related to operational matter;
- involving as many people from both labour and management as possible in solving 'real life' operational problems;
- undertaking joint research and data collection related to economic conditions or research related to employee attitude and job satisfaction; and
- encouraging the parties or individuals to share and discuss their perceptions of one another and exchanging roles for a period of time (p. 13).

These suggestions are very constructive given the UFV-FSA environment and they support the idea of reframing how the FSA approaches LAM, including who participates in these meetings (refer to the Recommendations section of this review for further detail). It may be helpful to consider the role of LAM as one that is part of the ongoing bargaining process, as issues emerge from the collective agreement that may require problem solving. Further, as a self-governing organization, the FSA represents members who are empowered to be part of the governance of UFV. This is unique to universities as organizations and LAM is a very important space where member interests relating to governance should be addressed. This also means that those who attend LAM may have expertise and knowledge specific to matters of university self-governance.

Communications from Contract Administrators

Ideally, Contract Administrators should be clearly documenting and regularly communicating with members of the executive, specifically the Chief Negotiator, the President and the Vice Presidents, about issues that *may* require adjustments to the collective agreement.

President

The president is the leader of the FSA and is accountable for the health and well-being of the organization. As its political leader, the President is ultimately accountable to membership and must oversee the administration of the organization. As such, the President must develop and deploy strategies that ensure solidarity that includes educating the membership about activities of the FSA as well as broader campaigns and initiatives. Results from the 2017 Membership Survey suggest that there are important gaps in membership knowledge that have implications for FSA leadership. Basic knowledge about the FSA, its offices, constitutional processes, communications tools, etc. are ultimately the responsibility of the President..

The President must know about all executive member activities to the greatest detail possible to ensure that these activities follow the strategic direction of the FSA and ultimately support the integrity of the collective agreement and membership workplace interests. While the President reports to the executive, there are numerous occasions where the President must address membership directly to provide direction and advice on emergent issues in the workplace. The President must have the flexibility to address membership as needed to support this work. This includes being informed of executive work through their detailed reporting to the executive and the President. Because the President is one of only three fully released positions, it is not uncommon for the President to take on aspects of contract administration and bargaining work. Access to executive members who are available (released) and knowledgeable about ongoing workplace concerns, shifts the President's work away from leading and organizing in efforts to support smaller, but time-consuming, daily problems and issues. This creates an unmanageable workload for the President's position. has been involved in the handling of numerous grievances as a by-product of an unexpected Faculty Contract Administrator transition. While it is understandable that the new CA requires time to "get up to speed" on issues and skill development, the burden of unexpected role changes should not be shouldered by the President and points to significant problems with communication, reporting, and training. Assigning the oversight of training/orienting to the Vice-presidents can assist when such circumstances arise. Further, with greater mentorship of Stewards, it is possible that the work of grievances can be better managed by those specifically delegated for this work, even when Contract Administrators change. The President must be able to focus his/her work on strategic planning, relationship management, organizational leadership, and coalition building with other stakeholders.

As the political leader of the FSA, the President is also responsible for regularly communicating the work of the executive to the membership. Rather than serving in an advisory capacity, the existing Communications Committee has become increasingly focused on process and gatekeeping. Acting thoughtfully and responsibly, members of the executive, including the President, require a straight-forward and accessible mechanism for liaising with membership, particularly if the FSA seeks to inspire and mobilize members.

Vice-presidents

Essentially, the roles of the Vice-presidents are to represent two different constituencies (staff and faculty), but their remaining duties are rather nebulous. Because the FSA has had a lack of strategic focus (i.e., there is no evidence of any long term strategic goals), the FSA leadership has struggled with consistency and direction. Other organizations often look to their vice-president positions as preparatory for a presidential role. Furthermore, the Vice-presidents and the President must be in full communication so that they all know what is going on within the union, associated stakeholders, and allies. If the FSA Vice-president duties were more clearly defined in a manner that aligned with those of the president, it is possible that these positions could contribute to greater leadership continuity.

The Vice-presidents do not typically chair executive meetings but this is a common practice in other unions (e.g., CUPE) as a way of enabling the President to speak to agenda items without also having to

administer meetings. Because the Vice-president positions have staggered terms, these positions are ideally suited to be responsible for the planning of training and orienting of new executive representatives. This would role would assist the Vice-presidents in understanding the needs and duties of all other executive members, improving executive continuity.

Because of their supporting role to the President and, potentially, the mentorship they can offer new representatives, Vice-presidents could benefit greatly by working more closely together. Rather than assume this is something which “should” occur, it may be valuable to implement structural changes which encourage greater teamwork. With the assistance of the President, Vice-presidents should be given dedicated opportunities to meet and develop plans for their work immediately following annual transitions. Vice-presidents, serving the political interests of their membership have an important role in supporting the work of the President in Labour and Management (LAM) meetings. Working closely together, the Vice-presidents and the President can focus on relationship building with management that is focused on solving material operational problems, research on issues of joint interest with management, and information sharing that is mutually beneficial.

Chief Negotiator

As the leader of the collective bargaining process, the Chief Negotiator is removed from individual member issues and is tasked with having a more holistic perspective of the collective agreement. While member issues can clearly be informed by interpretations of the existing agreement, the Chief Negotiator’s position is to determine whether problems of interpretation and application of the agreement are actually bargaining issues. All executive members, including Contract Administrators can support the Chief Negotiator by regularly communicating emerging issues.

By virtue of the duties of the Chief Negotiator, he/she has a vested interest in not creating conflicts that may hamper future bargaining. By circumventing practices that could undermine bargaining, including “side deals” or LOAs outside of bargaining on longstanding issues, there is greater opportunity to protect the existing agreement while creating an intentional and carefully constructed bargaining plan. In addition, the Chief Bargainer must be involved in every step of LOA & MOA development, when changes between bargaining years are deemed necessary.

Once such agreements are drafted, the FSA Executive, as a whole, must ratify the agreements. Depending on the magnitude of changes, such agreements may also require membership ratification. This measured approach to modifying the collective agreement between bargaining years sends a clear and strong message to the Employer that agreements will be carefully vetted. By making decisions more transparent to the executive and to membership, the FSA can better mitigate power relations with the Employer.

Contract Administrators & Stewards

The FSA dedicates substantial resources to managing two Contract Administrator (CA) and 12 Steward positions. As fully released positions, the Contract Administrator positions require volunteers who are

willing to step away from their roles with UFV for a two-year term. The work of the CA requires individuals who are organized, willing to participate in dispute resolution meetings with the Employer, and able to co-lead and mentor the team of Stewards. Although the work is neither evenly distributed through a work week nor predictable, there is an expectation that CAs effectively communicate their activities with the executive and document and report details of their activities in order to enable the executive to make decisions about grievances and develop strategies for future bargaining.

Contract Administrator Duties

Both the Staff and Faculty Contract Administrator are fully released positions. These positions were originally designed to administer conflicts/misunderstandings arising between individual members and the Employer. This process can reveal problems with the collective agreement that require attention from others on the executive. However, in practice, there is much more extensive involvement of the CAs in bargaining and collective agreement “tinkering.” This has manifested in activities that include sitting on bargaining teams, regular attendance in LAM meetings, and developing Letters of Agreement. It is not surprising, then, that the CAs have raised concerns about job complexity, training needs, and workload to the executive.

Compensation

The two CA positions are essentially the same (one addresses staff concerns and the other faculty) but each may receive different salaries. This is because the FSA policy is to pay the Employer replacement costs for released executive members. In other words, individuals volunteer to take on a FSA role (which is recognized by the Employer as legitimate service work) while continuing to be compensated for their work as an UFV Employee. While this variation can result in the staff CA member being paid more than the faculty CA member or the other way around, concerns around equal pay for equal work continue to surface. These concerns reflect a different philosophy to that of paying replacement costs.

It has been the FSA’s position that the executive does not have an employer-employee relationship with its executive officers. Further, union positions have not been reviewed through a job classification process, like that of Employer, to assess compensation because these positions are understood to be voluntary. This practice continues to be supported by members as seen in the 2017 Membership Survey: 84% of respondents support the practice of ensuring FSA members receive remuneration similar to what they would have received had they continued in their regular position at UFV. The FSA does not have an employee-employer relationship with FSA executive members and, as such, does not compensate based on a traditional employer-employee relationship. This practice helps to ensure that members entering FSA service work are neither advantaged nor disadvantaged by doing so.

Workload

The Contract Administrator positions are unique in that the workload primarily relies on ongoing and emerging individual member issues. CAs must manage their availability around the availability of members to discuss issues. Contract Administrators have indicated that their work takes them outside

of typical 9-5 work days, handling calls and meetings at all hours. Because there is no documentation that is regularly provided to track the work of Contract Administrators, it is difficult to assess the scope of these conditions to better assist with ensuring that workloads are manageable. Greater support from Stewards can assist with issues of availability. In addition, the FSA needs to develop more clearly articulated job descriptions and examples of work expectations; the lack of such guidance has left the CAs to define their work in ways that may conflict with the broader FSA objectives. Such expectations would assist in creating effective work parameters that could empower CAs to manage 35-hour work weeks. In other words, CAs configure their workloads on their own. Without a clear communication and document management stream, the FSA executive, including the President, remains largely uninformed about the day-to-day activities of the CAs.

Another workload issue for Contract Administrators is their role as observers with Selection Advisory Committees (SACs) to, presumably, ensure that interview procedures adhere to the collective agreement. The heavy emphasis on SAC participation is likely informed by a history of the FSA leading in hiring practices more than twenty years ago (FSA Memo, 2002). Stewards are also encouraged to attend SACs and other members of the executive may also be asked to participate. Again, there is no documentation or evidence of discussions around this practice to determine whether it is helpful to members or whether this is the best way to ensure the collective agreement is followed.

Contract Administrators are also responsible for supervising and providing training for Stewards. A 2017 survey of current Stewards reveals that the majority of Stewards (6 out of 7 responses) had received no training during the nine months that they held office. Four out of five respondents indicate that support from the FSA was “somewhat” adequate and one other indicated it was not adequate.

The 2017 Membership Survey indicates that Stewards are not being used to their capacity. When a workplace issue emerged, only 17% of respondents contacted a Steward. The FSA can more effectively utilize the Contract Administrator and Steward roles by building in a more structured process for supporting member concerns. The FSA executive must provide members with more information on the grievance process and protocols to seek out assistance. The Contract Administrator positions must work as a team with the Stewards in order to share the burden of work and responsibility. This can be achieved by providing intentional mentorship to Stewards through guidance from the Contract Administrators. Other ways of supporting Stewards, seen in other locals, includes inviting Stewards to various stepped grievance meetings to gain hands-on experience in handling disputes. Further, the FSA executive does not have a focused education campaign that can be used to guide members in handling individual workplace issues. Educational materials and transparency will further support the work of Stewards and Contract Administrators by enhancing member agency.

Stewards are an excellent and underutilized resource. As a large group of dispersed members, Stewards have the ability to liaise with members on day-to-day processes and issues, keeping the channel of communication between the FSA Executive and members open. However, Stewards rarely regularly attend executive meetings and appear to have very little involvement with the executive. Even more significant, this group has not been able to meet with one another. There is no formalized process to

allow for regular Steward meetings. Regular communication between Stewards and communication between Stewards and the FSA executive is critical to the effective mobilization of members and the strategic union activities. This gap in communication and reporting hampers the FSA's ability to effectively network with members.

Knowledge and Training

The administration of the collective agreement requires a solid understanding of that agreement and its implications for workers. All members of the FSA executive require training in their positions. However, as fully-released FSA executives, the learning curve for Contract Administrators and the President is particularly steep. These positions carry the greatest legal and operational burdens, being accountable for ensuring that members are appropriately represented in workplace disputes. Although the FSA Constitution indicates a Contract Administrator should have a good working knowledge of the collective agreement, the position is an elected voluntary position and there is no formal requirement for such knowledge. FPSE offers training and access to training through other organizations but it is up to the Contract Administrator to pursue this training. The FSA executive could lead in supporting CAs by identifying essential training opportunities and have these scheduled immediately upon a CA's election. Strengthening teamwork with the Stewards could facilitate an environment where Stewards move into Contract Administrator roles, as they gain knowledge and experience, offering a natural ladder into these positions. Other executive positions would also benefit from greater union training and education but the limited release time available for most of these positions is a challenge. This might be addressed through better scheduling, increased resource allocation, and enhanced job descriptions where expectations can be clarified.

Power Relations

Inevitably, the relationship between the Employer and the FSA can be uneven and when the political direction of the FSA shifts in ways that may not suit the agenda of the Employer (or vice versa), tensions arise. There is an undeniable power dynamic between the Employer and FSA executive members as these members risk agitating those who ultimately manage the institution. This is particularly challenging for the FSA's Contract Administrators because they are required to work closely with the Employer. Like the President, the CAs operate with a high degree of independence and it is assumed that their orientation is one that does everything to protect the integrity of the union's role in the workplace. Because the CAs and the President remain UFV employees who are entirely released from their regular duties, they can also be susceptible to the Employer's exertion of power. While the President's role bears significant and visible political positioning, the work of the CAs can be much less visible to members. While individuals may respond differently to the power relationship with the Employer, there is significant risk in how the Employer can exert influence over the CAs. As fully released executive members, the President and the CAs are perceived as performing the majority of the FSA work. This centralization of resources has led to a contract administration focus that not only limits the kinds of work the FSA undertakes but also concentrates union-management relationship building to a very small number of individuals. The relationship between CAs and the President is a close one that

requires tight teamwork and communication to ensure that Employer influences do not negatively impact the direction of the local as well as individual executive members.

Member Engagement

Member engagement is central to ensuring members are informed and involved in activities relating to collective bargaining, action, and education. Indeed, labor unions that “demonstrate greater concern for the broad economic, workplace, and social interests of their stakeholders” (Dawkins, 2012, p. 237) can benefit by seeing “higher levels of commitment among their members, and support from the outside community” (Dawkins, 2012, p. 237). The FSA infrastructure is inadequately positioned to focus more heavily on member engagement. This is partly because it is structured around the notion of *communicating* rather than *engaging* with members. For example, , the role of the Communications Chair is largely a functional position, rather than a political position, as can be seen in the Communications Policy that outlines the role of the Chair, which is to:

- maintain and work to improve regular and effective communications between officers and members, and among members;
- assist the president in maintaining good communications between the association and the media and other external organizations as need be;
- review and edit printed and electronic communications issued by the FSA executive to members and the media and other external organizations ; and
- consult with the communications committee as needed.

Because the FSA possesses significant support in its two office staff positions, many of the operational duties of communications can be reassigned. Indeed, such delegation can ensure that there is consistency in the look and feel of FSA resources. For instance, in previous years, the *Words and Vision* newsletter formatting and layout was managed by FSA staff. Having this work performed by a stable, ongoing team allows FSA elected members the ability to turn their focus on the organization’s political objectives. The current structure does not offer a formal mechanism, including a reporting structure that privileges member engagement. While the FSA newsletter, *Words and Vision*, has become a central focus of the Communications Chair, the low rate of member contributions and the modest readership levels (57% of Membership Survey respondents answer that they read *W & V* “sometimes” or “every issue”), combined with the slow uptake of the FSA discussion forum, *Discourse*, suggests that the FSA would be wise to diversify its methods for enhancing membership engagement.

When examining issues of member engagement, social engagement stands out as an important component because it is a low-risk and informal way to bring members together. Currently, the FSA delegates this work to one individual, the Social Committee Chair. This role is focused on strengthening social relations among members through event planning. There is a strong need for more strategic and methodical approaches to engagement that incorporate social activities but also political mobilization. Confronting workplace challenges requires a knowledgeable, inspired, and mobile membership because it is, ideally, every member’s responsibility to act when there are threats to workplace well-being.

To determine the ideal ways to support this work, the executive needs to be aware of the scope and limitations of the work performed by the Social Committee Chair. Currently, there is no easy and regular mechanism of communication other than basic reporting to the executive. In fact, it is beyond the scope of the Social Committee Chair to engage in more expansive and politicized organizing. It is very important to have this role support social functions but, if the FSA wishes its membership to become more active in their union, there is a powerful need for FSA leadership to include a position that is politically dedicated to member engagement beyond what currently exists.

For example, the FSA can build-in more direct and interactive systems to assist members in understanding the collective agreement and bargaining processes. The Chief Negotiator's role, traditionally focused on bargaining, could incorporate regular and inclusive consultation and discussion with membership between bargaining years. Creating opportunities to participate in bargaining planning can offer members new mechanisms for understanding the construction of the collective agreement. This, in turn, can aid members in self-reliance and heighten expectations for mutual member support as a first-line-of-defense when workplace issues emerge.

A Vice-president dedicated to engagement can coordinate forms of activism with the Social Committee Chair but also seek out collaborations with others, depending on the nature of the activity or strategy. For instance, a Vice-president could facilitate the FSA member participation in external rallies, demonstrations, fundraisers, celebrations, outreach, and campaigns.

Constitutional Issues

The FSA does not have a "resign to run" bylaw. Those occupying FSA positions can run for other FSA positions without resigning from their held position. A "resign to run" bylaw would force candidates to commit to one future office. By retaining their position as a kind of fallback, members who do not resign may be perceived to neglect their current position while running. They may also be perceived to have an unfair advantage over other candidates, by virtue of holding another position and leveraging resources in that position when campaigning for another. Currently, those who successfully acquire a new position force a secondary system of voting that adds a further burden on the FSA administration. If members must first resign, all voting can occur at once, reducing the number of by-elections.

Another issue related to voting is one of constituency-based voting, or the lack thereof. Throughout the FSA's history, all members of the FSA have been able to vote for all positions, regardless of who the representative is tasked to represent. For example, all members are able to vote for the FPSE Non-Regular Employee Representative. The position's duties require that the representative "promote the interests and needs of non-regular employees". This situation is also true for the Staff and Faculty Contract Administrators and Staff and Faculty Vice-president positions. Other positions like President, Communications Chair, and Chief Negotiator are "at-large" positions in which any member in good-standing can volunteer for. The 2017 Membership Survey indicates that more than 51% of members think that some elected positions should only be elected by the groups they represent (24% of respondents had no opinion).

The FSA has also always presented collective agreements to membership for ratification allowing all members to vote on all articles as a unified collective. 59% of all members surveyed in the 2017 Membership Survey agree that only affected members should vote on ratifying certain portions of the collective agreement (14% had no opinion). These results may be informed by the introduction of rank and tenure processes for faculty and the general restructuring of work at UFV that change the “stakes” of ongoing employment.

For example, the heightened expectations of faculty to receive ongoing, tenured appointments has greatly impacted the way work and workloads are defined in the collective agreement for this group. The same can be said for staff positions which also have entirely different evaluation processes from faculty. This problem speaks to a reliance on members to have an intimate understanding of articles in the agreement that have nothing to do with their own lived experiences. As noted earlier, it is even a challenge for members of the FSA executive to have a thorough working knowledge of the collective agreement and it is a very tall order to expect the same from the general membership. It may be more manageable for membership to vote on aspects of the agreement that are a) common across all members and b) specific to their own interests.

Finally, FPSE elected representatives are currently elected for one year terms. Those occupying these positions have been clear that these terms are too short for representatives to fully embrace the roles. It is typical for most FSA executive members to require a year to orient themselves to their duties and, for the FPSE representatives, this brings them to the end of their term.

Accountability of FSA Executive Members

The FSA Constitution and By-laws includes a list of duties for each executive position but these duties are often lacking in detail. Aside from writing reports for *Words & Vision* and a final report for the Annual General Meeting, there are few detailed deliverables for FSA positions. This makes it very difficult for the executive to assess areas of weakness and strength when developing a strategic direction. While it may not be necessary to include such work within the Constitution, there are no detailed descriptions or, even, orientation documents for FSA positions. If examples of engagement activities were available to each executive member’s role, this would offer new members a much clearer sense of how roles on the executive interrelate and inform broader FSA goals. Such documentation would also provide those considering running for a position the opportunity to have a stronger sense for the role and improve the orientation process for new representatives.

In addition to making position expectations transparent and well-articulated, the FSA must also address difficulties with executive members being aware of and willing to uphold executive policies. Being aware of and upholding FSA policy should not be the sole burden of the Secretary-Treasurer and there is a marked need for all executive members to know, understand, and follow policies.

Funding Releases

The FSA is made up of groups whose workloads and working conditions are structured in very different ways. Teaching faculty (including sessionals), for example, are released according to teaching sections. Other Type B Faculty have work days that are not analogous to teaching faculty and are, in many cases, structured in similar ways to staff. Like staff, some faculty are released according to replacement costs for one (e.g., Staff Vice-president) to five (e.g., Staff Contract Administrator) days a week. Other positions, like the Social Committee Chair and JPDC Chair are either provided small stipends or their departments are paid to replace the representative when the member performs union work.

A notable exception to this practice is a policy for the Non-regular representative, who receives remuneration for time-sheeted hours up to a maximum of 125 hours at the prevailing sessional rate. Any hours above 125 hours have to be submitted to the Finance and Administration Committee for approval.

Executive members will continue to be paid their usual salary (the union cannot disadvantage members) and this means that releases will not look the same for all elected members. This is most evident for at-large positions that can be occupied by different employee types from one year to another.

The operating principle, however, is that elected members are not paid by the union for their service work. Rather, they are released from their regular employment while performing service (see

). This means that the compensation for fully released positions will vary according to a representative's salary with the Employer. This practice ensures that FSA executive members do not financially benefit when serving the union.

Summary of Executive Positions

The FSA has experienced a significant amount of internal conflict over recent years and it is quite possible that external organizational pressures, including changes to higher education, have been a contributing factor. The FSA has an opportunity to adapt to changing needs to become more effective and efficient in its delivery of support to membership.

The current FSA structure places a great deal of pressure and emphasis on fully released positions. By having two fully released Contract Administrators, the direction of the FSA tends to favour discourse around daily dispute resolution, with the President operating as the main political voice. This has limited the organization's ability to be both flexible and intentional.

For example, the FSA does not have a formal collective bargaining strategy and only recently adopted its first strategic plan. A lack of planning results in a wide range of inconsistencies that includes internal decision making. A recent example is the suspension of the FSA Member Loan Policy that was quickly undermined when a member of the executive advocated for a special case and an exemption was made. Such inconsistencies not only weaken internal decisions, they send very powerful messages to

membership and the Employer that the FSA does not have an organized approach to member and labour issues.

As the FSA's fully released political leader, the President spends a great deal of time and energy stewarding the executive rather than leading. The effects are sometimes subtle but profound. For example, the Contract Administrators have moved into roles, such as serving on the Labour and Management committee, which pull them away from their core responsibilities in handling grievances and supporting Stewards, partly because they are more *available*.

Opportunity for greater involvement for those in positions that are/should be more political in nature are limited by their very part-time releases. The Vice-presidents, for instance, struggle to regularly meet with the President because of their availability, hampering more intentional and coordinated work. The FSA's introduction of a strategic plan (Appendix K: FSA Strategic Plan) prioritizes three key initiatives to ensure the FSA mission "to promote and protect the welfare and professional interests of the association membership:"

- Member Engagement
- Labour-Management & Governance
- FSA Operations

Much of this work could be dispersed to Vice-presidents, who would then delegate to appropriate executive members. For instance, as part of the FSA Operations initiative, VPs could coordinate the education/training of executive members to ensure that they are adequately supported and empowered to perform their work. Currently, no such harmonization exists, leaving it up to executive members to seek out support, even when they are uncertain of what they may need. This is particularly true for Contract Administrators, who frequently come into these roles with little or no experience and training. There is space, then, among Vice-presidents to better support the President, and the executive, through more focused job descriptions and greater releases.

Although the VP positions are set out to support the President, these positions are not currently well defined for supporting the political leadership of the FSA. Rather, the current job descriptions actually pose a risk to the organization in that they do not prioritize relationship building, planning, and leadership in ways that can support the growing complexities of union work.

The current two Vice-president positions are defined by constituency (i.e., staff/faculty). The roles, by virtue of their titles, delineate work by two constituencies (despite the fact that others exist, as well) that builds in the divisiveness with which the FSA continually struggles. Interestingly, the constituencies that these positions represent do not solely choose their representatives. Results from the Membership Survey suggest that this does not necessarily align with member interests (e.g., when asked if some executive positions should be elected only by the groups they represent, 51% of respondents said "yes"). Further complicating representation, the FSA has a Non-regular Representative in addition to the two Vice-president positions, creating a rather inconsistent hierarchical arrangement.

Hierarchical arrangements are important to ensuring there is a clear structure of accountability. This is of particular importance to a volunteer organization like the FSA, where representation is elected. While the President is ultimately accountable to membership, compliance on reporting and transparency from executive members is often invisible to broader membership. In other words, it is not always clear to members whether their interests are being well served.

And there is a service issue that needs further examination: of the 54% of members who experienced a workplace injustice that was not resolved, 36% indicated that they did not feel they had the support of their union. Through the development of a strategic plan, the FSA repeatedly identified the significance of member engagement as a means of ensuring that membership is not only informed about labour issues but is also *interested* in supporting and serving the FSA.

While this review did not closely analyze how people decide to serve on the FSA executive, this process has revealed that mentorship and engagement are essential components in building a strong, focused, and successful organization. In addition to improving transparency and accountability of executive member activities, reorganization can create better conduits for mentorship. Through positions that do not require substantial release from other work, members can volunteer to serve in low-risk ways, laddering into positions of greater responsibility as their knowledge and interest grows. Coordinating training can create more systematic opportunities for knowledge-building that can be both supportive and empowering. Enhancing political leadership through Vice-president positions that are functionally defined can better support the President. Expanding the role of Chief Negotiator can ensure that formal and more consistent bargaining plans are developed between bargaining cycles. Further, the Chief Negotiator can better protect the existing collective agreement by having greater participation in ongoing agreement problem solving. Involving Stewards in FSA executive work will not only provide an important mentorship ladder for more complicated contract administrative positions but will also provide greater member support. This can also be said for building in Member-At-Large positions that become a more accessible point of contact for members of different constituencies, providing new space for political work within the Vice-president roles.

Communication at all levels of the executive is critical to member engagement and problem solving. As such, communication processes need to be decentralized, shifting emphasis from a Communications Chair position to a more general communications committee that focuses on long-range communication goals rather than detailed-oriented work, some of which is already performed by FSA office staff. This will ease constraints on “messaging” and open up greater opportunities for member dialogue with the FSA executive. In turn, this will create a natural space in which executive activities can be more visible to membership and ensure greater accountability. There are a number of other issues with the present FSA executive design that are addressed in the Recommendations section of this review.

Recommendations

In addition to reviewing internal documents and processes and conducting a membership survey, the review process involved consultation with FPSE, other FPSE local presidents, and labour experts affiliated with organizations like CAUT and CUFA. This work culminates in a number of recommendations that consider the broader post-secondary labour context, the needs of FSA members and the pressures facing the current FSA executive to address those needs.

The purpose of the following recommendations is to ensure that the architecture of the FSA is ideally situated to support a healthy and sustainable union that is designed to actively protect and promote the well-being of its members. The recommendations are organized in a manner that begins with addressing the overall structure of the FSA. Consequently, recommendations are organized as follows:

- Executive Structure
- Constitutional Changes
- Relationship Development
- Collective Bargaining
- Data Collection and Records Management

Executive Structure

Recommendation 1: Restructure the FSA Executive

The FSA is more than forty years old and although its configuration has been slightly modified over this span of time, its structure has remained fundamentally unchanged. The most recent transition from university college to university has triggered fundamental shifts in UFV's strategic plans that affect every aspect of the organization, including its labour force.

A repositioning of FSA resources (including human power) can mobilize and empower members in ways that can vastly improve the organization's overall ability to protect workers. Because the FSA is its membership, there is a need for all members to be better educated on the role and purpose of their union. Further, there is a need to improve membership knowledge and involvement in the FSA. This is only possible if the executive is structured to foster greater member involvement/engagement. The current FSA structure is not organized to enact the priorities outlined in the member-approved Strategic Plan 2016-2021 (Appendix K).

The recommendations for restructuring are intended to facilitate informed decision-making about the future of the FSA and its leadership. As such, the restructuring proposal does not include specific cost calculations for releases and other forms of compensation that may be required (doing so is premature). It is assumed that membership will first determine what kinds of changes are necessary. The restructuring recommendation is intended to fulfill the following purposes:

1. strengthen internal reporting structures;
2. concentrate greater resources in political positions;

3. create more opportunities for members to engage with FSA representation;
4. redistribute workloads to accommodate the initiatives, goals and activities of the FSA Strategic Plan;
5. improve member support by creating defined roles to manage member engagement;
6. prioritize bargaining;
7. improve utilization of Steward positions to improve member support for workplace injustices;
8. improve communications with different constituencies through focused Member-At-Large positions;
and
9. facilitate succession planning.

Refer to Appendix A: Proposed Executive Structure for a visual representation of the following proposed changes.

President	Table Officer
Vice-president, Bargaining	Table Officer
Vice-president, Grievances	Table Officer
Vice-president, Member Engagement	Table Officer
Secretary-Treasurer	Table Officer
Member-at-Large, Regular Staff	
Member-at-Large, Regular Faculty	
Member-at-Large, Non-Regular Employees (& FPSE Representative)	
Chief Steward	
FPSE Representative, Status of Women	Unchanged
FPSE Representative, Human Rights and International Solidarity	Unchanged
Co-chair, Joint Classification and Audit Committee	Unchanged
Co-chair, Joint Occupational Health and Safety Committee	Unchanged
Co-chair, Joint Professional Development Committee	Unchanged
Chief Negotiator	Eliminated (see VP, Bargaining)
Staff Vice-president	Eliminated
Faculty Vice-president	Eliminated
Staff Contract Administrator	Eliminated (see VP, Grievances and Chief Steward)
Faculty Contract Administrator	Eliminated (see VP, Grievances and Chief Steward)
Agreements Chair	Eliminated
Communications Chair	Eliminated (see VP, Member Engagement)
Social Committee Chair	Eliminated (see VP, Member Engagement)

By reconfiguring the Vice-president positions as political rather than constituency-based positions, the President's work can be better supported. VPs would be more intimately involved in planning, coordinating, and relationship building. Substantial release frees up Vice-presidents to handle issues and

meet as Table Officers on a weekly basis. Avoiding full release offers employees the opportunity to remain engaged in their respective departments. This ensures that volunteers remain in regular contact with their home departments to maintain a connection to the workforce, eliminating the need to completely suspend other professional work. Such a workload also ensures that VPs remain familiar with working conditions as they experience them as employees.

Vice-president, Bargaining: Absorbing responsibilities of the Chief Negotiator, the VP Bargaining would oversee work relating to the planning and carrying out of the bargaining process. By virtue of the position the VP Bargaining would have a comprehensive knowledge of the collective agreement and a broader understanding of labour issues, making this VP an ideal Co-chair of LAM. The Contract & Agreements Committee would oversee issues relating to the existing collective agreement, including CA audits and coordinating meetings with membership on CA articles. The VP Bargaining would also participate in broader bargaining initiatives, including FPSE's Bargaining Coordination Committee. Leading up to bargaining, the VP Bargaining would also coordinate Contract & Agreements Committee meetings and establish bargaining teams.

Vice-president, Grievances: Absorbing the responsibilities of the Contract Administrators, the VP Grievances would directly oversee the work of the Chief Steward and manage grievances from all constituents. Presently, Contract Administrators do their work jointly, suggesting a duplication of effort that can be concentrated more effectively by making better use of Stewards. Working with the Chief Steward, the VP Grievances will oversee the election process of the Chief Steward and his/her training. The Chief Steward would report directly to the VP Grievances and would work collaboratively on organizing Stewards. VP Grievances would initiate, in the name of the FSA, all grievances against the Employer and oversee all processing of such grievances.

Vice-president, Member Engagement: Taking on the current portfolios of Communications Chair and Social Committee Chair, the VP Member Engagement would be responsible for receiving reports from Members-at-Large (new positions) and coordinating the communications and social committees.

Designed to assist the President in relationship building, this VP would coordinate with the President attendance at community functions including UFV recognition events (i.e., retirement dinners, employee recognition dinners), representation on affiliated committees (e.g., Fraser Valley Labour Council), and stand in for the President whenever required. Not only does this offer the President relief when away on other business, it elevates the FSA's participation in community activity.

This VP would also be responsible for overseeing and coordinating the training and development needs of the executive. This would involve the development of annual professional development plans and executive participation in community partner activities (e.g., attending CAUT, CUFABC, and FPSE conferences and working groups). The VP Member Engagement would also oversee the social committee, which is responsible for member social events. Elected Members-at-Large would report to this VP, who would ensure that issues are delegated to appropriate representatives.

Secretary-Treasurer: Unchanged.

Members-at-Large: In consultation with the VP Member Engagement, Table Officers will prioritize the duties and work of the Members-at-Large. These are three new positions, representing specific constituencies (regular staff, regular faculty, and non-regular employees). Members-at-Large would be elected by the constituencies they represent and would attend executive meetings.

Agreements Chair: Unlike all other locals within FPSE, the FSA has had the position of Agreements Chair to negotiate Collective Agreement issues between bargaining years. This is a highly irregular method of managing negotiations outside of regular bargaining that has resulted in a number of problematic Letters of Agreement. These agreements did not appear to involve the Chief Negotiator or incorporate formal consultation and approval from the FSA executive or the membership. As discussed elsewhere in this review, the role of Agreements Chair is problematic and should be eliminated. The functions of the Agreements Committee would be subsumed under the VP Bargaining and the Contract & Agreements Committee.

Chief Steward: Elected by the Stewards, the Chief Steward would serve on the Grievance Committee and work with the VP – Grievances in overseeing formal grievances. The Chief Steward would be responsible for directly coordinating the work of Stewards and would report to the VP-Grievances regularly. The Chief Steward would assess the training and communication needs of Stewards. The Chief Steward would also work with the VP- Grievances to arrange Steward training.

Recommendation 2: Empower Steward roles and create clear and formal training/mentorship processes for Stewards.

The review process reveals that the twelve Steward positions are grossly underutilized. Operating as the “first-point-of-contact,” Stewards typically represent and defend the interests of fellow employees by communicating policies to members, educating members on where they can obtain information, and ensuring members are informed about collective agreement issues and developments. However, as indicated in the Membership Survey, members who face workplace problems do not appear to be consulting with Stewards as a first step. Indeed, the survey suggests that most members do not even know who their area Steward may be.

The Steward Survey conducted for this review demonstrates significant lags in Steward training and minimal executive meeting involvement. The result leaves tremendous opportunities for enhanced Stewards involvement, both with the executive and with members. Also, Stewards are a key point of entry for members who may be interested in exploring possibilities of union service without requiring a commitment to formal leadership responsibilities. In other words, Steward positions offer members access to union representatives who are immersed in the workplace and serve as sites for union mentorship.

At the time of this review, it is the responsibility of Contract Administrators to organize the training and work of Stewards. After surveying stewards and discussing the matter with the President, there is little indication to suggest that this happens regularly and effectively. Steward positions are difficult to fill and Steward survey comments indicate that the FSA could do more to involve Stewards in facilitating member education, engagement, and empowerment. The conflation of Steward work and Contract

Administration work has led to costly inefficiencies in which Contract Administrators double-up on work, centralizing contract administration in ways that greatly limit the possibility of Steward contributions. The research in this review suggests that having two fully-released Contract Administrators is operationally and financially unnecessary because the twelve Steward positions are not being appropriately educated and empowered. The proposed reorganization of the executive allows for the coordination and oversight of grievances and Steward training & development through a single VP position that allows for a more decentralized approach to member support and engagement.

The result is that Stewards require a more intentional training and mentorship program. Such a program not only involves the use of FPSE Steward training workshops but also the development of a customized handbook for FSA Stewards, regular Steward Committee meetings, an invitation to Stewards to participate in executive sub-committee work, and regular communications with the executive that includes detailed reporting. This work will require an examination of how Stewards are released/compensated when restructuring.

Recommendation 3: Develop detailed job descriptions for all FSA executive positions & clarify the reporting structure.

Currently, FSA executive positions are articulated within the constitution. However, feedback from executive members indicates that these descriptions do not adequately capture the scope of work and responsibilities of these positions. Refined descriptions that articulate the relationship between positions, reporting requirements and deliverables, and role's purpose that aligns with the FSA's strategic plan will assist those new to these roles and offer membership greater insight into the kinds of work that each position performs.

The manner in which executive members participate on committees will need to be more deeply explored during this process. Ideally, committee chairs should be elected by the committee they serve. This would ensure that the chairs (or, as in the case of Stewards, Chief Steward) is accountable to the committee. This model has been applied to some joint committees, where representatives are first elected by membership and then elected, by their respective committee, to serve as chair.

In recent years, there has also been some confusion about the nature and scope of confidentiality and conflict of interest. Clearly articulated job descriptions can assist in clarifying expectations of confidentiality and identifying situations that may result in conflict of interest. Clarifying the accountability & reporting structure is also necessary. For example, the President must report to the executive and membership and is accountable to membership for the operations of the executive. This will assist in ensuring that decision-making is transparent and all roles on the executive are clearly defined. It would be helpful to offer FSA executive members embedded language around these topics when articulating job descriptions. In this way, questions around professional conduct can be addressed as new FSA executive members are elected, providing clear guidelines and expectations that can be referred back to at any time.

Recommendation 4: Revise FSA Representation on LAM.

In addition to the President, the Vice-presidents should attend LAM meetings to ensure efficient and effective communication of labour issues. As table officers, the Vice-presidents ensure continuity in communicating labour issues with membership and supporting the President's task of being accountable for the political and operational direction of the union. If the recommended restructuring was enacted, this would also mean the VP Bargaining would be present at LAM. Under the existing structure, the Chief Negotiator could be included in LAM meetings, if agenda items pointed to potential bargaining issues that required his/her knowledge and expertise.

While LAM is the arena where emerging issues can be addressed, it is also a critical space where "continuous bargaining" can occur. Members of this group should be chosen by the union (not management), as they need to be those who serve the political interests of the union and be able to work collectively as part of the FSA team so that ideas are presented to management in unison. Individual member issues are not the focus of LAM as there is an existing grievance protocol. As representatives of individual member issues, the current practice of having Contract Administrators regularly attend LAM meetings confounds their role of stewarding the existing collective agreement (i.e., managing grievances) while "negotiating" for changes that fall within the purview of the FSA's elected political leaders.

This recommendation acknowledges the President's prerogative to invite support from whomever might be necessary to advance a particular cause or steer through a particular issue. LAM is the space where workload issues, morale, staffing, professional development, and concerns over policies can be explored. It is essential that the FSA LAM team communicates/caucuses regularly to ensure a unified and strategic voice. A reformulation of the LAM team might empower the union to address matters like the elimination of the Writing Centre and Academic Appeals Office in ways that more effectively nudge management to recognize FSA members as important stakeholders in organizational decision-making.

Constitutional Changes

In addition to making constitutional changes to speak to changes in the configuration of the FSA executive structure, there are some other constitutional issues requiring attention.

Recommendation 5: Change the FSA Constitution to increase FPSE representative terms to staggered two-year terms.

Currently, FPSE representatives are elected for one-year terms. Because it takes some time to understand the role and plan events and other activities, two-year terms would allow for greater consistency and better service delivery. The only challenge is the election of the Non-Regular Representative, whose employment status may change from year to year. One mechanism to deal with this may be to simply run a by-election if an elected representative's employment status does change.

Recommendation 6: Change the FSA Constitution and Bylaws to include a “resign-to-run” bylaw.

As mentioned earlier in this review, “The FSA does not have a “resign to run” bylaw. Those occupying FSA positions can run for other FSA positions without resigning from their held position. A “resign to run” bylaw would force candidates to commit to one future office. By retaining their position as a kind of fallback, members who do not resign may be perceived to neglect their current position while running. They may also be perceived to have an unfair advantage over other candidates, by virtue of holding another position and leveraging resources in that position when campaigning for another.

Recommendation 7: Ensure that only constituents elect constituency-based representatives.

Regardless of the FSA executive reorganization, members clearly favour a system where constituency-based positions are elected by only those constituents.

Recommendation 8: Discontinue the FSA’s registration as a society.

As a Society, the FSA must adhere to government controls that limit the association’s flexibility. Further, recent changes to the *Societies Act* grant the government, as a regulatory body, greater powers over societies. Already certified as a trade union, there is no clear benefit for the FSA to also be a registered society.

From a liability standpoint, there is no advantage for a union or to an officer to be incorporated under the Society Act. On the contrary, the fact that a union is incorporated under the Society Act allows access to the oppression remedy to members and any person who is, in the discretion of the Court, a proper person to make an application. Thus, incorporation expands the union's and its officers' liability.

Recommendation 9: Reinstate the JCAC Co-chair vote on the FSA executive.

There is no clear explanation as to why the JCAC Co-chair’s vote was eliminated from the FSA Executive in 2012. The 2012 FSA AGM minutes suggest that the rationale was derived from inconsistency with the Collective Agreement where the JCAC Co-chair is described as *appointed*. However, like the JPDC position, the FSA has always run an election for this position. Like the JPDC Co-chair, the JCAC Co-chair, in practice, has been elected by the broad membership. There is no logic to having this position as the only non-voting member of the executive.

Recommendation 10: Prioritize executive resources: Remove executive requirements to attend SACs.

There is no clear logic for requirements that FSA executives and Stewards sit on SACs. There are no specific expectations around FSA executive/Steward roles on SACs, other than to serve as “eyes” and “ears” during this one aspect of the hiring process. The FSA does not participate in other important aspects of the SAC (development of criteria, shortlisting, deliberations, etc.). FSA SAC attendance does not ensure that members are engaged and protected. A reliance on FSA executive members/Stewards to serve on every SAC is not an effective use of FSA resources in that there is no evidence that such a presence offers a material or political benefit to the SAC process. If the FSA can turn these resources to ensuring that there is enhanced education and engagement from all members in hiring, then members can work to ensure that all aspects of the SAC process align with the collective agreement.

The FSA requires a greater flexibility in the assignment of executive SAC observers by focusing on potentially problematic SACs.

Participation in SACs is incredibly time-intensive and if all FSA members are better to trained/informed to be attentive to procedural problems in SACs, they would not only have greater ownership over the process but they would also be able to protect that process without additional union members present. Improved member engagement and education relating to the Collective Agreement and workplace justice can better ensure that SAC processes operate smoothly.

An option may be to analyze situations where a formal FSA presence is required and prioritize SAC attendance based on need. A close examination of postings and SAC composition may also be necessary to determine if there are situations that require pre-SAC meeting interventions (e.g., there may be cases where the composition of the SAC may not be appropriate).

Relationship Development

The review process has revealed a number of information gaps regarding the composition and needs of membership. This is highly problematic when tasked with protecting member rights and workplace well-being. Even basic information about employees and their respective departments is not readily available. To ensure that the FSA is able to build viable and informative relationships with its members, data collection about members must improve.

Recommendation 11: Develop a handbook (print and/or electronic) for all FSA members about how to identify workplace problems (both in health & safety and in workplace injustice).

Although the FSA executive oversees the activities of the association, the success of the FSA is contingent on the knowledge and engagement of its membership. Many workplace problems can be resolved independently by members if they are empowered with some basic information. The Membership Survey clearly indicates that many members need even very basic information about their union, including knowing where the FSA offices are located and who makes up the FSA elected executive. Not only would members personally benefit from basic problem solving information, they are much more likely to become engaged in FSA issues and activities if they understand that they are a) part of a labour union, b) have the right to ask questions about their working conditions, and c) have ready access to information and support that can assist them in problem solving. In turn, this would alleviate executive workloads by encouraging members to participate in work to resolve their own issues, when possible. The FSA should use the wealth of support documents and information available through FPSE and other unions.

Recommendation 12: The FSA President reach out to the UFV Student Union Society.

This can, perhaps, begin a renewed effort to build a coalition with the student body. Several presenters at the March 2017 Confederation of University Faculty Associations (CUFA BC) conference strongly encouraged post-secondary labour associations to build relationships with their respective student associations. There are many shared interests between the FSA and SUS, driving a need to foster a more

constructive relationship. Doing so will assist the FSA in ensuring that both organizations are familiar with issues of mutual interest and perhaps reduce actions that may put the FSA and SUS at cross-purposes.

Recommendation 13: Develop a plan to support casual workers.

As noted under the section titled “External Contexts,” the casualization of work has significant effects on the workplace and is a trend that is likely to continue. Casualization also has a significant impact on bargaining. While there is much evidence to suggest that casualization greatly impacts quality of service, it also fundamentally erodes the financial, emotional, and professional well-being of employees. Tasked with protecting member rights, the FSA must formally acknowledge the growth in casualization and develop strategic methods to resist. “If full-time faculty unions can offer support to contract faculty [and staff] ...they should” (Foster, 2016, p.27). A plan to support casual workers would acknowledge their unique circumstances and challenges, offering greater opportunities for engagement with this constituency, providing space for these members to discuss their issues, and developing bargaining strategies.

Collective Bargaining

Recommendation 14: All agreements made with the Employer between bargaining years are ratified by the whole FSA executive and, when required, by membership.

There are some unavoidable occasions when the Employer and the FSA must solve an emergent problem in a formal agreement. These are termed “Letters of Agreement,” Letters of Understanding,” or “Memorandum of Understanding.” When such agreements are made, it is necessary that they are formally agreed upon by the FSA executive and, in most cases, the membership as a whole. It is essential that membership be informed of changes to the Collective Agreement as they occur. It is advisable that agreed changes to the Collective Agreement occur during bargaining years and only emergent and pressing issues be negotiated between contracts.

Recommendation 15: Incorporate the removal of Article 32: Agreement Committee from the Collective Agreement in the FSA bargaining plan for 2019.

With the removal of the Agreement Chair executive position, this long-standing and highly irregular article can be removed.

Recommendation 16: Establish a bargaining plan that aligns with the FSA Strategic Plan.

The FSA has never had an intentional and ongoing bargaining strategy. Rather, the FSA has conducted surveys to gauge member interests in the time leading up to bargaining. A more intentional, coordinated plan that is informed by this review, regular membership surveys, possible “article meetings” with members, and Collective Agreement audits will provide the executive with greater opportunities to regularly engage with members, communicate bargaining issues well in advance of bargaining, and enable the executive to enter bargaining with greater member support.

Data Collection and Records Management

Recommendation 17: The VP, Member Engagement develop consistent record-keeping methods to document FSA events.

Social events are also political ones in that they help support endeavors to internally organize the union. It is critical that the FSA track the scope and the specifics of all social activities as part of its more global organizing efforts. Although the cost of FSA events can be tracked through the FSA office, the details around FSA social events, including contact lists and timelines, would reside with the VP, Member Engagement. This enables more effective planning, as well as the implementation of events. This would also enable delegation of tasks around planning and holding repeating events to FSA office staff and Social Committee members, and allow the FSA to develop an annual calendar of events.

Recommendation 18: FSA develop and maintain a comprehensive list of FSA members and their home departments.

Member engagement begins with knowing who the FSA members are and where they work. There are numerous circumstances where the FSA may wish to reach out to specific departments and areas. It is also difficult to monitor employment trends within the institution without having up-to-date information in this area. For example, when overall employment growth is reported by the Employer, it is not always clear which areas may experience this growth, particularly for staff, because this data does not have to be reported to government with the same granularity as academic change.

Recommendation 19: FSA track membership numbers on a monthly basis.

This is a labour-intensive process but tracking this work enables the FSA to identify employment patterns to better understand membership composition. This work would be part of the FSA office staff, providing regular reports to the President that can then be shared with the executive.

Recommendation 20: Strengthen reporting requirements for FSA executive members.

With the introduction of a records management system, the FSA can now easily store and make accessible documents arising from FSA work. Stewards, Vice Presidents, and representatives serving on joint committees, for example, should be providing detailed monthly reports of their activities. These reports would reflect the specific work that occurs during these intervals. Submissions would go to the FSA office for filing.

Recommendation 21: Request an annual summary of FSA interactions with FPSE.

Members show a continued interest in the benefits of FPSE membership. As such the FSA should provide members with annual updates on the support received from the FPSE including FPSE staff visits/support, legal support/costs, and FPSE sponsored workshops and conferences.

Recommendation 22: Conduct an FSA policy audit.

An analytical audit of the FSA's policies could not be included in this review but the benefit of such work would ensure greater consistency and compliance of policy by executive members.

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APPENDICES

Appendix A: Proposed Executive Structure



Legend

E/A = Elected by all members

E/C = Elected by constituent members

E/CM = Elected by FSA committee members

A = Appointed

Dotted lines represent relationships among the Executive Committee and with other elected or appointed positions with the FSA

Notes

* Represented by Member-at-Large, Non-Regular Employees or appointee, as necessary (appointee would not be member of Executive Committee)

Appendix B: FSA Executive Compensation

	2008-09	2009-10	2011-12	2012-13	2013-14	2014-15	2015-16 ¹⁵
President	7 releases	7 releases	7 releases	LTA	LTA	LTA	LTA
Staff VP	Replacement or 1 release	Replacement or 1 release	Replacement or 1 release	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases
Faculty VP	2 releases	1 release	1 release	2 releases	2 releases	2 releases	2 releases
Communications Chair	Replacement or 2 releases	Replacement or 1 release	Replacement or 1 release	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases
Secretary Treasurer	Replacement or 1 release	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases	Replacement or 2 releases
Chief Negotiator/Contract Chair ¹⁶	Replacement or 2 releases	Replacement or 4 releases	Replacement or 3 releases	Replacement or 4 releases	Replacement or 5 releases	Replacement or 5 releases	Replacement or 5 releases
Agreements Chair	Replacement or 0.5 release	Replacement or 0.5 release	Replacement or 1 release	Replacement or 1 release	Replacement or 1 release	Replacement or 1 release	Replacement or 1 release
Staff Contract Administrator	Replacement, Full-time	Replacement, Full-time	Replacement, Full-time	Replacement, Full-time	Replacement, Full-time	Replacement, Full-time	
Faculty Contract Administrator	7 releases	7 releases	7 releases		LTA	Full replacement	LTA
Non-regular Representative	1? Data insufficient	Hourly (\$3,200)	Hourly (\$4,000)		Hourly (\$5,100)	Hourly (\$8,800)	Hourly (= 1 release)
Shop Stewards			Lump (\$350)		Lump (\$350)	Lump (\$350)	Lump (\$350)
Social Chair	Up to \$1,000	Up to \$1,000	Up to \$1,000	Up to \$1,000	Up to \$1,000	Up to \$1,000	Up to \$1,000
Total Costs ¹⁷		\$230,073		\$227,970	\$235,254	\$262,856	\$323,177

¹⁵ Costs include benefits (20.5%)

¹⁶ 2012-13 Contract Chair changed to Chief Negotiator

¹⁷ Costs include discretionary funds and releases

Appendix C: Review Scope Questions

Goal: To understand what the architecture of the FSA must be to ensure sustainable, equitable, and healthy working conditions for UFV.

Scope

1. How does the FSA fit into the broader context of organized labour in Canadian post-secondary education? For example,
 - what is the nature of the relationship between the FSA and the Federation of Post-Secondary Educators?
 - what do changes in the post-secondary education community mean for the FSA's mandate and goals?
2. What kind of advocacy does the FSA engage in?
3. Are the structures of the FSA effective and efficient? For example,
 - is the allocation of work appropriate for each executive position?
 - is there adequate information / records management systems in place?
 - does the budget adequately support the work of the FSA?
 - how does the organization of the executive compare to that of other locals?
4. Does the FSA meet the needs of members? For example,
 - are grievances handled efficiently and with acceptable outcomes?
 - does the FSA offer services that support the well-being of members?
 - does the FSA effectively communicate with members?
5. How do FSA executive members contribute to the FSA's goals?
6. Does the FSA support the needs of executive members in achievement of these goals?
7. How does the Collective Agreement work to protect quality education? For example,
8. How does the FSA emphasize sustained cross-campus initiatives?
9. How do we balance/negotiate/consider "union issues" and "academic issues"? Are they divided?
10. To what extent is it the role of FSA in defending the rights of students? What is the relationship between FSA and SUS?

Appendix D: 2017 FSA Membership Survey Results Summary

Sent to:

736 faculty (includes teaching, sessional, academic support, and academic advisors)

425 staff (includes Type A, C, D and auxiliary)

It should be noted that respondents were not obligated to answer each question, so the number of respondents may vary.

Total: 1,161 invitations to participate

Characteristics of respondents

	<i>n</i>	%
Staff, Type A	130	46.43
Staff, Type C	12	4.29
Staff, Type D	5	1.79
Faculty, Type B Teaching	96	34.29
Faculty, Sessional	26	9.29
Faculty, Academic Support	6	2.14
Academic Advisor	3	1.07
Director	2	0.71
Total	280	100.00

1. Do you know where the FSA offices are located?

	<i>n</i>	%
Yes	189	64.95
No	102	35.05
Total	291	100.00

2. Do you know the names of at least one current shop steward?

	<i>n</i>	%
Yes	164	56.75
No	125	43.25
Total	289	100.00

3. How many members of the FSA executive can you name? Please provide a number.

	<i>n</i>	%
Know 0 or 1	72	25.44
Know 0, 1, 2, 3, 4	152	53.71

Mode = 4

4. Have you ever served on the union as an elected executive member?

	<i>n</i>	%
Yes	32	11.15
No	255	88.85
Total	287	100.00

5. Have you ever considered serving on the union executive?

	Yes		No		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	29	22.48	100	77.52	129
Staff, Type C	4	33.33	8	66.67	12
Staff, Type D	2	50.00	2	50.00	4
Faculty, Type B Teaching	35	36.46	61	63.54	96
Faculty, Sessional	5	20.83	19	79.17	24
Faculty, Academic Support	2	33.33	4	66.67	6
Academic Advisor	1	33.33	2	66.67	3
Director	2	100.00	0	0.00	2
Total	80	28.99	206	71.01	276

Why not?

	<i>n</i>	%
Time	37	23.72
Interest	35	22.44
Lack of knowledge/experience	20	12.82
Other	64	41.03
Total	156	100.00

6. Have you ever read an article in the FSA collective agreement?

	<i>n</i>	%
Yes	276	95.83
No	12	4.17
Total	288	100.00

7. Have you examined the collective agreement in the last six months?

	<i>n</i>	%
Yes	224	77.78
No	64	22.22
Total	288	100.00

8. Do you know where to find the most current collective agreement on the FSA website?

	<i>n</i>	%
Yes	224	78.05
No	63	21.95
Total	287	100.00

9. Have you ever attended a FSA Annual General Meeting?

	<i>n</i>	%
Yes	192	66.21
No	98	33.79
Total	290	100.00

10. The FSA newsletter, *Words and Vision*, is available in print at the FSA office and online at the FSA website and is issued four times per year. How often do you read the FSA newsletter?

	<i>n</i>	%
Never	17	5.86
Sometimes	108	37.24
Most Issues	92	31.72
Every Issue	73	25.17
Total	290	100.00

11. If you have read the FSA newsletter, *Words and Vision*, what format do you use (select the best answer)?

	<i>n</i>	%
Print Only	102	37.50
Online Only	170	62.50
Total	272	100.00

12. Have you ever felt strongly enough about an issue that you wanted to contribute to the FSA newsletter, *Words and Vision*?

	<i>n</i>	%
Yes	58	20.00
No	232	80.00
Total	290	100.00

13. *Discourse* is the name of the discussion forum tool used by the FSA on the FSA website. Using *Discourse* can encompass reading postings and/or making posts. How often do you use *Discourse*?

	<i>n</i>	%
I have never used Discourse	156	55.71
Less than 3 times total	89	31.79
Regularly, one time per month	33	11.79
Regularly, once a week	2	0.71
Regularly, every day	0	0.00
Total	280	100.00

14. If you answered, “never used Discourse” please identify why.

	<i>n</i>	%
I was not aware it existed	99	55.6262
I have no interest	39	21.9191
I am concerned about my privacy	19	10.6767
Other, please explain	21	11.860
Total	178	100.00

Most responses under “Other, please explain” relate to technical difficulties or lack of time.

15. Each year, the FSA donates 1.5% of the dues we collect to primarily registered charities in the Fraser Valley. Do you agree with this practice?

	<i>n</i>	%
Yes	212	75.71
No	68	24.29
Total	280	100.00

Comments:

25% (18/72 comments) or 6.42% of total responses suggest donations should be left up individuals. Several comments also wanted more information on what charities and how they are decided. A few others (6) suggested those charities should be students.

16. Each year, the FSA allocates 2% of the dues we collect to hosting FSA member events. Do you agree with this practice?

	<i>n</i>	%
Yes	221	79.21
No	58	20.79
Total	279	100.00

Comments:

14.93% (10/67 comments) or 3.58% of all respondents on this question indicate support for the Welcome Back BBQ. While other comments vary greatly, there are some (4) who feel FSA events shouldn't be tied to Christmas/Easter. There are several comments that suggest that people do not fully understand what the FSA pays for and the relationship between some events hosted by the FSA and those hosted by the Employer.

17. Do you think that some executive positions should be elected only by the groups they represent? For example, should only non-regular (and auxiliary) employees vote for the non-regular representative? Or, should only staff vote for staff vice-president?

	Yes		No		No Opinion		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	52	40.94	40	31.50	35	27.56	127
Staff, Type C	1	8.33	7	58.33	4	33.33	12
Staff, Type D	3	60.00	1	20.00	1	20.00	5
Faculty, Type B Teaching	64	68.09	13	13.83	17	18.09	94
Faculty, Sessional	16	61.54	3	11.54	7	26.92	26
Faculty, Academic Support	3	50.00	1	16.67	2	33.33	6
Academic Advisor	0	0.00	1	33.33	2	33.33	3
Director	2	100.00	0	0.00	0	0.00	2
Total	141	51.23	68	24.80	68	24.73	275

18. Do you think that only affected members should vote on ratifying certain portions of the collective agreement? For example, should only faculty vote on faculty workload articles? Or should only staff vote on staff workload articles?

	Yes		No		No Opinion		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	
Staff, Type A*	66	51.16	42	32.56	21	16.28	129
Staff, Type C	5	41.67	4	33.33	3	25.00	12
Staff, Type D	3	60.00	1	20.00	1	20.00	5
Faculty, Type B Teaching*	73	76.04	17	17.71	6	6.25	96
Faculty, Sessional	14	56.00	6	24.00	5	20.00	25
Faculty, Academic Support	2	33.33	4	66.67	0	0.00	6
Academic Advisor	0	0.00	1	33.33	2	66.67	3
Director	0	0.00	2	100.00	0	0.00	2
Total	163	58.63	77	27.70	38	13.67	278

* Faculty, Type B Teaching responses are significantly higher than Staff, Type A.

19. When working for the FSA, members receive remuneration similar to what they would have received had they continued in the regular position at UFV from which they are released.

	Yes		No		No Opinion		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	99	77.34	9	7.03	20	15.63	128
Staff, Type C	10	83.33	0	0.00	2	16.67	12
Staff, Type D	3	75.00	0	0.00	1	25.00	4
Faculty, Type B Teaching	85	89.47	4	4.21	6	6.32	95
Faculty, Sessional	24	92.31	0	0.00	2	7.69	26
Faculty, Academic Support	3	100.00	0	0.00	0	0.00	3
Academic Advisor	3	100.00	0	0.00	0	0.00	3
Director	2	100.00	0	0.00	0	0.00	2
Total	231	84.00	13	4.73	31	11.27	275

20. The FSA sometimes increases annual pay and vacation for some fully released executives.

	Yes		No		No Opinion		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	41	31.54	62	47.69	27	20.77	130
Staff, Type C	4	33.33	5	41.67	3	25.0	12
Staff, Type D	1	20.00	3	60.00	1	20.00	5
Faculty, Type B Teaching	23	24.21	53	55.79	19	20.00	95
Faculty, Sessional	8	30.77	9	34.62	9	34.62	26
Faculty, Academic Support	2	33.33	3	50.00	1	16.67	6
Academic Advisor	2	66.67	0	0.00	1	33.33	3
Director	1	50.00	1	50.00	0	0.0	2
Total	82	29.39	136	48.75	61	21.86	279

21. Our past practice has, from time to time, provided some fully released FSA executives with extra time upon “Exit” to be taken after the end of their terms.

	Yes		No		No Opinion		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	
Staff, Type A*	37	28.91	52	40.63	39	30.47	128
Staff, Type C	4	33.33	4	33.33	4	33.33	12
Staff, Type D	1	20.00	3	60.00	1	20.00	5
Faculty, Type B Teaching	26	27.37	52	54.74	17	17.89	95
Faculty, Sessional	9	34.62	8	30.77	9	34.62	26
Faculty, Academic Support	1	16.67	2	33.33	3	50.00	6
Academic Advisor	1	33.33	1	33.33	1	3.33	3
Director	1	50.00	1	50.00	0	0.00	2
Total	80	28.88	123	44.40	74	26.71	277

* Staff Type A show significantly lower “no”s than Faculty

22. Should the FSA membership be consulted regarding the provision of extra compensation for FSA executive members.

	Yes		No		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	110	85.94	6	4.69	128
Staff, Type C	6	50.00	4	33.33	12
Staff, Type D	5	100.00	0	0.00	5
Faculty, Type B Teaching	84	27.37	5	5.21	96
Faculty, Sessional	16	61.54	6	23.08	26
Faculty, Academic Support	5	83.33	1	16.67	6
Academic Advisor	2	66.67	0	0.00	3
Director	1	50.00	1	50.00	2
Total	229	82.76	23	8.3	278

No Opinion: *n* = 26 (9.4%)

23. On a scale of not important (1) to very important (5), how important is the FSA's role in upholding my rights as an employee. (*n* = 281)

Average: 5

Mode: 5

24. On a scale of not important (1) to very important (5), how important is the FSA's role in advocating for retirement benefits? (*n* = 280)

Average: 4

Mode: 5

25. On a scale of not important (1) to very important (5), how important is the FSA's role in advocating for health/extended care benefits? (*n* = 282)

Average: 4

Mode: 5

26. On a scale of not important (1) to very important (5), how important is the FSA's role in protecting wages? (*n* = 278)

Average: 5

Mode: 5

27. On a scale of not important (1) to very important (5), how important is the FSA's role in ensuring job security? (*n* = 280)

Average: 4

Mode: 5

28. On a scale of not important (1) to very important (5), how important is the FSA's role in ensuring equal compensation for equal work?

Average: 4

Mode: 5

29. On a scale of not important (1) to very important (5), how important is the FSA's role in providing greater opportunities for social engagement between members? (*n* = 276)

Average: 3

Mode: 3

30. On a scale of not important (1) to very important (5), how important is the FSA's role in engaging with other affiliated labour organizations? (*n* = 279)

Average: 4

Mode: 5

31. On a scale of not important (1) to very important (5), how important is the FSA's role in contributing to broader social initiatives like charities and community services.? (*n* = 280)

Average: 2

Mode: 3

32. On a scale of not important (1) to very important (5), how important is the FSA's role in ensuring members can effectively participate in UFV governance? (*n* = 276)

Average: 4

Mode: 5

33. On a scale of not important (1) to very important (5), how important is the FSA's role in ensuring the workplace is safe and healthy? (*n* = 279)

Average: 4

Mode: 5

34. Overall, do you feel your working conditions are:

	<i>n</i>	Improving		Deteriorating		Stagnant	
		<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
Staff, Type A	128	19	14.48	34	26.56	65	50.78
Staff, Type C	11	5	45.45	2	18.18	2	18.18
Staff, Type D	5	0	0.00	0	0.00	3	60.00
Faculty, Type B Teaching	96	4	4.17	56	58.33	27	28.13
Faculty, Sessional	26	5	19.23	7	26.92	14	53.85
Faculty, Academic Support	6	0	0.00	2	33.33	3	50.00
Academic Advisor	2	1	50.00	1	50.00	0	0.00
Director	2	0	0.00	0	0.00	2	100.00
Total	276	34	8.33	102	8.33	116	42.00

Great disparity between FT Staff and FT faculty.

35. What is your single largest concern about your working conditions? (*n* = 232)

71 (30.6%) respondents highlighted workload as an issue.

36. Have you ever had an issue relating to a workplace injustice?

	Yes		No		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	53	41.41	75	58.59	128
Staff, Type C	4	33.33	8	66.67	12
Staff, Type D	0	0.00	5	100.00	5
Faculty, Type B Teaching	52	54.17	44	45.83	96
Faculty, Sessional	8	30.77	18	69.23	26
Faculty, Academic Support	2	33.33	4	66.67	6
Academic Advisor	3	100.00	0	0.00	3
Director	1	50.00	1	50.00	2
Total	123	44.33	155	55.567	278

37. Did you look at the collective agreement?

	<i>n</i>	%
Yes	106	82.81
No	13	10.16
Does Not Apply	9	7.03
Total	128	100.00

38. Did you bring it to the attention of your union representation?

	n	%
Yes	92	73.02
No	26	20.63
Does Not Apply	8	6.35
Total	126	100.00

39. Who did you contact?

	n	%
Shop Steward	19	17.12
Contract Administrator	32	28.83
Faculty Vice-president	4	3.60
Staff Vice-president	9	8.11
President	18	16.22
Non-regular Representative	4	3.60
Other	25	22.52
Total	111	100.00

40. Did you get a timely response?

	Yes		No		Total n
	n	%	n	%	
Staff, Type A	32	69.57	14	30.43	46
Staff, Type C	2	66.67	1	33.33	3
Staff, Type D	0	0.00	0	0.00	0
Faculty, Type B Teaching	38	79.17	10	20.83	48
Faculty, Sessional	7	77.78	2	22.22	9
Faculty, Academic Support	2	100.00	0	0.00	2
Academic Advisor	2	100.00	0	0.00	2
Director	0	0.00	1	100.00	1
Total	83	74.77	28	25.23	111

41. Was the matter resolved?

	Yes		No		Total <i>n</i>
	<i>n</i>	%	<i>n</i>	%	
Staff, Type A	20	41.67	28	58.33	48
Staff, Type C	1	33.33	2	66.67	3
Staff, Type D	0	0.00	0	0.00	0
Faculty, Type B Teaching	23	48.94	24	51.06	47
Faculty, Sessional	5	55.56	4	44.44	9
Faculty, Academic Support	2	100.00	0	0.00	2
Academic Advisor	1	50.00	1	50.00	2
Director	0	0.00	1	100.00	1
Total	52	46.43	60	53.57	112

42. If you answered “No” to having the matter resolved, why was it not resolved? (*n* = 56)

20 (35.7%) respondents indicated they did not have support of the union.

43. The UFV FSA is a local of the Federation of the Post-Secondary Educators which is... Did you know UFV was a member?

	<i>n</i>	%
Yes	231	82.50
No	49	17.50
Total	280	100.00

44. Would you like to know more about the FSA’s relationship to FPSE?

	<i>n</i>	%
Yes	105	37.63
No	174	62.37
Total	279	100.00

45. Please select the response that best describes your employee status:

	<i>n</i>	%
Staff, Type A	130	46.43
Staff, Type C	12	4.29
Staff, Type D	5	1.79
Faculty, Type B Teaching	96	34.29
Faculty, Sessional	26	9.29
Faculty, Academic Support	6	2.14
Academic Advisor	3	1.07
Director	2	0.71
Total	280	100.00

46. How long have you been a member of the FSA at UFV? (277)

	n	%
0-5 years	71	25.63
6-10 years	71	25.63
11-15 years	58	20.94
16/ years	27	9.75
More than 20 years	50	18.05
Total	277	100.00

Appendix E: FSA Executive Survey

FSA Operational Review - Workload Survey

At the direction of the FSA president and in preparation for developing a self-study of the FSA executive, this questionnaire is intended to aid in developing an understanding of workloads for each executive position. Because of the service orientation for these positions, there is an assumption that, aside from fully released positions, the work of the executive will be mitigated by individual circumstances and interests. Thus, the work defined in job descriptions may not accurately align with what individual executive members actually do. The review will assist in identifying responsibilities that are “core” to FSA operations and how such work is assigned.

To ensure that the review process runs smoothly and efficiently and provides us with a solid base to begin, it would be ideal if you could complete the following questions by August 31, 2016. This can be done by answering the following questions as a new document (include the questions) or using this document as your template. Please email responses to Christina Neigel at Christina.neigel@UFV.ca.

While the final review will be informed by your answers as a public document for membership, feel free to denote any particular responses as “confidential” if there are issues or concerns with something you wish to share. The information collected will be reviewed by the yet-to-be-established Review Committee in the fall. This is just giving us a head-start. It is exploratory. Job descriptions can be reviewed here: <http://www.UFV-fsa.ca/wp-content/uploads/2012/07/FSA-Executive-position-descriptions-and-duties/15/16.pdf>

There are nine questions in total.

1. Your name:
2. Your current position:
3. How long have you served in your position?
4. Describe the work that you do as a member of the FSA executive (please note: this is what you actually do, not necessarily what is described in the job description).
5. How much time do you dedicate doing this work? (You can describe this as a monthly, weekly or annual summary as it may vary according to the position you have).
6. What work do you feel is essential to the position that you hold? (please consider that each member brings unique interests and skills that shape the position for their term and focus on what you deem all officers, in this position, should be doing)
7. Is there any additional work/responsibilities that you believe should be included in your position?
8. Is there any work that you believe should be shifted to another position (whether that position exists or not)?
9. Do you have any additional comments regarding your position and/or workload?

Appendix F: FSA Steward Survey 2017

You are receiving this email because you are an FSA shop steward.

The FSA is currently engaged in an operational review. The goal of this review is to understand what the architecture of the FSA must be to ensure sustainable, equitable, and healthy working conditions for UFV. The following questions have been developed to specifically understand your experience as a shop steward in order to effectively address any gaps. By participating in this brief survey, you can help to ensure that the FSA review addresses issues and concerns that are specific to being a shop steward as well as find ways to enhance service to membership. This survey should take no more than 15 minutes to complete. Please complete by March 17th, 2017.

You do not need to answer questions that you do not want to answer or that make you feel uncomfortable. This questionnaire is confidential. Your responses will be held in confidence with the lead investigator, Christina Neigel (Christina.neigel@UFV.ca) who will be the only person reviewing the questionnaire responses. An analysis of these responses will be included in the FSA review. However, since your group is small, others may be able to identify you on the basis of references you make. Please keep this in mind in deciding what to tell me. If you do not mind me sharing your identity in responses you make, please indicate this at the end of the survey.

1. How long have you been a shop steward for the FSA (continuous time)?
 - 0-11 months
 - 2 years
 - 4 years
 - 5- 8 years
 - More than 8 years
2. How many times have you been a shop steward at UFV?
3. Can you describe your understanding of the role?
4. If you have served as a steward before, did you have formal training previously? Can you describe the scope/nature of this training?
5. Have you had any formal training in your current position? Can you describe the scope/nature of this training?
 - In your current role, how many member concerns have you addressed or managed? b) How many of these concerns have had an acceptable outcome?
6. Do you feel you are adequately supported by the FSA? Explain your response.
7. FSA Executive meetings are held approximately once per month.
8. Are you interested in attending FSA executive meetings?
9. If you are interested but have not attended executive meetings, can you explain why?
10. On a scale of 1 to 5 (1 = very poor, 2 = poor, 3 = fair, 4 = good, 5 = excellent), how would you rate your familiarity with the Collective Agreement?
11. Would you like to participate in regular shop steward meetings?

12. Do you meet with members (old and new) to discuss union issues?
13. What kinds of additional information or support would you find helpful in your role as shop steward?
14. The FSA has one staff and one contract administrator. What is your understanding of the role of these contract administrators?
15. Do you have any other comments that would inform the review process?
16. Please indicate whether I can use your responses with your identity.
 - Yes/No
 - Any special instructions?

Appendix G: FSA Executive Positions

Note: Each current FSA executive role, based on text from the constitution, has been broken down to show eligibility, term, releases, workload, essential components, and duties. Most positions include a discussion that breaks down issues that manifested through various aspects of the review process.

FSA Position: President

Eligibility:.....Open to all FSA members in good standing

Term:.....2 years

Releases/Compensation:Fully released from UFV position

Workload:Full-time

Essential Components:

- FSA administrative office oversight
- FSA organizational oversight
- Coalition building with external and internal stakeholder groups (FPSE, Board of Governors, Labour and Management, etc.)
- Set and manage executive meetings
- Signing authority for FSA financial matters
- Member of FSA committees
- Liaise with members
- Liaise with other stakeholder groups, both internally and externally

Duties:

The President shall preside over meetings of the Executive Committee and over all general meetings of the Association. The President is empowered to ensure compliance with the Constitution and to uphold rules of order. He/she shall, in collaboration with Executive Committee members, exercise a general care over and supervision of all matters of the Association, including the FSA office, and the supervision and performance appraisal of FSA staff. The President may be an ex-officio member of all Faculty and Staff Association committees. The President is expected to attend all UFV Board of Governors meetings, Labour and Management committee meetings, Federation of Post-Secondary Educators (FPSE) Presidents' Council meetings and will delegate other FPSE duties and responsibilities as required. The President will also serve as a signing officer for FSA financial matters.

Discussion:

While the President's role is to guide the work of the FSA and, ultimately, lead the organization, the "general care and supervision of all matters of the Association" can involve extensive effort focused on managing the work of other executive members. In recent years, this work has consumed a significant amount of time because of changes in positions outside of regular election periods. The need to orient and educate new members about their duties and the important nuances of their positions is significant. The President must be aware of all FSA activities and serve as a mentor/coach to those he or she leads. Because the responsibility for the care and stewardship of the FSA rests with the President, his or her obligations are extensive. As such, the President is also in need of robust administrative and leadership support.

Because the FSA does not have a mentorship program to assist with leadership, new Presidents are at risk of being buried in their own steep learning curve while also supporting other executives who are often new to their roles. Until the spring of 2017, the FSA did not have a strategic framework, leaving Presidents on their own in terms of developing an organizational direction. In addition, there is no shadowing of roles so new Presidents have no access to their own orientation. This has led to numerous difficulties explored elsewhere in this report.

Coalition building with other stakeholders, both within and external to UFV, is integral to the effective operation of the FSA. The duties outlined in the constitution specifically highlight engaging with the Federation of Post-Secondary Educators (FPSE) President's Council. As a member of FPSE, this is a very necessary role if the FSA is to participate fully with the Federation to ensure that the FSA maximizes access to FPSE resources while also contributing to the "greater good" associated with belonging to a federation. Indeed, it is advisable that the President also participate with other labour organizations such as CAUT, CLC, and Fraser Valley Labour Council, as a way of ensuring greater support through this network. As the spokesperson for the FSA, it is important that the President develops external relationships because such coalitions provide:

a broader perspective on social issues and satisfies workers' desire to participate in those issues. It provides an opportunity for more members to become involved in union activities and helps combat their sense of powerlessness in the face of the new global economy (Mathers, 2000, p. iii).

Internally, the President must liaise with management in informal and formal exchanges that include Labour and Management meetings and Board meetings. Often the President is invited to report to the Board of Governors and this presents an important, if not critical, opportunity for the FSA to convey information about issues and stories of positive experiences with other stakeholder groups at UFV. Serving as a liaison with the employer, the FSA President has a significantly influential role in setting the tone for labour relations. As a result, the President's role would greatly benefit from a system of mentorship and orientation to support the complex operational and political elements of the position and ensure membership of organizational continuity.

In practice, the President is responsible for directing the work of the office staff and the executive. This responsibility, however, is implied and is not explicitly outlined under duties in the constitution. This places the President in the untenable situation of being ultimately accountable to membership as the association's leader without the necessary tools to direct work and hold members of the executive to account, particularly those members who are significantly released for this service work. There is no mechanism or clarity around how executive members demonstrate their accountability to membership. This internal accountability issue significantly undermines the President's role as the leader of the organization who must know about all of the work of the executive and ensure that this work aligns with the mandate of membership.

FSA Position: Faculty Vice-president

Eligibility: Open to all FSA Faculty B, Academic Support Faculty, Directors, Sessionals, Academic Advisors

Term: 2 years

Releases/Compensation: 2 releases per year. More available for special projects. Typically, releases taken as 1 in fall term and 1 in winter term.

Workload: Depending on projects, this role can consume far more than 6 hours a week. Standing committees and FPSE work is substantial. Supporting contract administration is a loose term... presently member issues are notable.

Essential Components:

- Standing in for the president
- Member of the Finance & Administration, Communication, Contract Committees.
- Support Faculty Contract Administrator, as required
- Signing officer on FSA matters
- Liaising with faculty constituency

Duties:

The Faculty Vice-president may assume all the responsibilities and duties of the President in his/her absence, including chairing meetings, setting agendas, attending meetings, etc. He/she shall serve as a liaison between faculty constituency and the FSA Executive. The Faculty Vice President shall be an active participant in the committee work of the Association, in particular, shall be a member of the Finance Administration Committee, the Contract Committee, and the Communications Committee, and shall actively assist and support the Faculty Contract Administration Chair as required. He/she will be a signing officer for FSA financial matters.

Discussion:

The Faculty Vice-president role operates as a kind of back-up support to the work of the President. This role is flexible, making space for work that the President prioritizes. In bargaining years, this role is much more labour intensive due to the increased expectations for contract meetings and the necessary groundwork involved in preparing for those meetings. There is room for the Faculty Vice-president to support coalition building by attending meetings and events with current and prospective stakeholders but much of this work depends on the relationship of the Vice-president and the President.

There are a range of difficulties with the duty to support the work of the faculty contract administrator. For example, it is unclear what “support” means. Further, the FSA’s budget heavily resources contract administration in the form of twelve shop steward positions and two fully released contract administrator positions. There is no clear workflow or communications structure between these various positions. There are also no articulated expectations outlining role delineation and responsibilities. The Faculty Vice-president is not trained in the ways of contract administration but must handle questions and inquiries from membership regarding workplace issues. These issues are classified as members seeking:

- information about the union’s role and responsibility, either specifically or generally;
- advice to troubleshoot a specific problem;
- directional information about other workplace supports; or
- to share information about an observed event, problem, or concern.

While these points outline the duty of the Faculty Vice-president to liaise with the faculty constituency, the Vice-president, in practice, liaises with all members. The kind of relationship the Faculty Vice-president maintains with membership is highly dependent on the individual filling this role.

As part of the VP’s duties is the duty to support Faculty Contract Administrator. The focus of a vice-president is to support the role of President. Other members of the executive, including Contract Administrators, report to the Vice-presidents to ensure a healthy channel of communication. Contract Administrators are supported by their Stewards. Administrative support is offered through the President, the executive and the FSA staff.

Both the Staff and Faculty Vice-presidents speak at events and attend other employee and community functions as well as lead executive meetings, when the president is unavailable. There is no formal manner in which the work is decided between the two Vice-presidents.

Essentially, the role of the Faculty Vice-president is broad, lacking specific objectives. The result is that the Vice-president has the flexibility to tackle special projects and activities according to the interest and disposition of the individual holding the office. There is opportunity for the Faculty Vice-president to coordinate more strongly with the Staff Vice-president. However, this work relies on mutual respect and a willingness to work together. This can be challenging, particularly because the Staff Vice-president and Faculty Vice-president positions are staggered terms, leaving less time for these two to find ways of working together.

It should also be noted that because there are two Vice-president positions, there is no documented process to handle situations where the President may step down from his/her position.

FSA Position: Staff Vice-president

Eligibility:.....Open to all Contract A, C, D, staff

Term:.....2 years

Releases/Compensation:1 7-hour day/week replacement

Workload:

Essential Components:

- Standing in for the President
- Member of the Finance & Administration, Communication, Contract Committees.
- Support Staff Contract Administrator, as required
- Signing officer on FSA matters
- Liaising with staff constituency

Duties:

The Staff Vice-president may assume all the responsibilities and duties of the President in his/her absence, including chairing meetings, setting agendas, attending meetings, etc. He/she shall serve as a liaison between staff constituency and the FSA Executive. The Staff Vice-president shall be an active participant in the committee work of the Association, in particular, shall be a member of the Finance Administration Committee, the Contract Committee, and the Communications Committee, and shall actively assist and support the Staff Contract Administration Chair as required. He/she will be a signing officer for FSA financial matters

Discussion:

See discussion under Faculty Vice-president.

FSA Position: Agreements Chair

Eligibility: Open to all FSA members

Term: 2 years

Releases/Compensation: 0.5/1/0 (Has varied)

Workload: Agreements Committee has not met for some time

Essential Components:

- Clarifies Collective Agreement
- Reviews policy
- Clarify and Interpret UFV FSA Constitution

Duties:

On the recommendation of the Executive Committee, and where necessary when ratified by the membership, the Agreement Chair will discharge Memoranda of Understanding and Letters of Agreement related to the Collective Agreement. As a member of the joint Agreement Committee, he/she deals with questions of clarification of language in the Collective Agreement. In consultation with other members of the Executive Committee, he/she shall review ongoing policy initiatives for compliance with the Collective Agreement. The Agreement Chair will call meetings of the Agreement Committee to clarify, interpret, and recommend UFV FSA CONSTITUTION BYLAWS – as at April 30, 2015 11 Memoranda's of Understanding, Letters of Agreement, or policy initiatives. The Agreement Chair must communicate all decisions of the Agreements Committee to the Contract Administration Chairs and the Chief Negotiator. (See article titled 'Agreement Committee' in the Collective Agreement for duties of this committee)

Discussion:

An audit of agreements and past practice in recent years suggests that the role of the Agreements Chair has significant capacity to jeopardize the integrity of bargaining and the Collective Agreement. This is an unusual position compared to other FPSE locals, where agreements made between bargaining years are managed by the Chief Negotiator and the executive. By negotiating separately from the Chief Negotiator, the Agreements Chair complicates the problem-solving process and it is possible that clarification of issues could be managed differently.

Currently the Collective Agreement contains language on the Agreement Committee (article 32):

32.1 Composition, Constitution and Duration

(a) The Agreement Committee shall be composed of two (2) representatives of the Employer and two (2) representatives of the Association, provided that alternate representatives may be appointed from time to time. If possible, at least one (1) of the representatives of the Association and one (1) representative of the Employer will have been members of their respective Negotiating Committees for this Agreement.

The Committee shall be constituted within one (1) month of the signing of the Agreement, and shall continue for the duration of this Agreement.

(b) The Committee shall meet as often as is necessary, at the request of either party, to discuss and make recommendations on:

- (i) problems of Agreement interpretation;
- (ii) matters of employer-Human Resources arising out of this Agreement;
- (iii) amendments to the current Agreement;
- (iv) policy matters under consideration by the Employer which may be in conflict with the Agreement.

32.2 Policy Matters

In order to give appropriate consideration to policy matters, the Agreement Committee shall be provided by the Administration with all necessary information regarding the general procedures which will be used to implement proposed UFV policy.

It is not clear why a specific Agreements Chair position is necessary to discuss problems with the collective agreement. The Chief Negotiator is ultimately responsible for the process of bargaining for the FSA. Because the Chief Negotiator has an intimate knowledge of the agreement, he/she is most qualified for understanding the implications of making changes to that agreement. In addition, the Chief Negotiator has a vested interest in protecting the agreement from inconsistencies and encroachments of rights because he/she is ultimately tasked with future bargaining. In other words, the Chief Negotiator must “live” with agreements negotiated outside of bargaining years and has a vested interest in ensuring such agreements do not make future bargaining more difficult.

Currently, the Chief Negotiator sits on this committee with the Agreements Chair.

FSA Position: Secretary-Treasurer

Eligibility:Any FSA member in good standing

Term:2 years

Releases/Compensation:2 releases

Workload:2.5-4 hours per week from September to March; month of April 5-10
hours per week

Essential Components:

- Serves as the Chief Financial Officer of the Association.
- Prepares a financial statement of the Association for each meeting as required by the Executive Committee.
- Have the books of the Association reviewed each year by a registered accountant elected and approved by the Executive Committee..
- Represent the FSA in bargaining with CUPE regarding the FSA office staff.
- Supervise the FSA Administrative Assistant – Financial including conducting performance appraisal.
- Invest the surplus funds of the Association in the name of the Association
- Act as Privacy Officer and shall be responsible for ensuring compliance with PIPA.
- Act as Returning Officer for all voting that takes place
- Submit a written report on the administration of his/her office to the Annual General Meeting.
- Chair the Finance and Administration Committee
- Educate Executive members of FSA policies

Duties:

- The Secretary-Treasurer shall be the Chief Financial Officer of the Association. All cheques drawn on the Association's accounts will be signed by the Secretary-Treasurer and the President or by two of four signing officers with one signer being either the Secretary-Treasurer or the President. The two additional signers are named as signing officers by the Executive Committee. The Secretary-Treasurer shall be in charge of books, documents, files and effects of the Association which shall reasonably be subject to inspection by the President and the Executive Committee or any Association member in good standing, subject to the Association's duty to remain compliant with the Personal Information Protection Act (PIPA).
- The Secretary-Treasurer shall prepare a financial statement of the Association for each meeting as required by the Executive Committee. The Secretary-Treasurer shall have the books of the Association reviewed each year by a registered accountant elected and approved by the Executive Committee. Such reviews shall be furnished annually to the Executive Committee and published to the membership.
- The Secretary-Treasurer will represent the FSA in bargaining with CUPE regarding the FSA office staff. He/she will also supervise the FSA Administrative Assistant – Financial including conducting performance appraisal.
- The Secretary-Treasurer shall, subject to the approval of the Executive Committee, invest the surplus funds of the Association in the name of the Association, in accordance with the relevant laws of British Columbia.
- The Secretary-Treasurer shall be bonded in such amount as shall be determined by the Executive Committee.
- The Secretary-Treasurer shall act as Privacy Officer and shall be responsible for ensuring compliance with PIPA.
- The Secretary-Treasurer shall be responsible for submitting from revenue any affiliation fees.

- The Secretary-Treasurer shall act as Returning Officer for all voting that takes place pursuant to Article 3.7. In the event that the Secretary-Treasurer is unable to perform this function, the Executive committee shall appoint another Executive member in his/her place.
- The Secretary-Treasurer shall submit a written report on the administration of his/her office to the Annual General Meeting.
- The Secretary-Treasurer will chair the Finance and Administration Committee

Discussion:

This position encompasses a great deal of responsibility to steward the Association’s finances and electoral process. The position also requires supervisory skills to work with the FSA Finance Assistant.

Serving as a kind of accountability “touchstone” for the FSA executive, the Secretary-Treasurer must possess an intimate knowledge of the Association’s policies and their relationship to the FSA’s activities. From a broader organizational standpoint, monitoring and disclosing financial and governance processes enables members to better gauge the health and effectiveness of their organization. While this is not the sole responsibility of the Secretary-Treasurer, this position anchors the executive in engaging in sound practice. The Secretary-Treasurer not only has to commit to upholding policy but he/she must assist in educating other executive members (as well as the broader membership) of their scope and importance. This role, not easily captured as measureable “workload,” has become a growing area of focus and stress. If not all executive members are on-board with knowing and abiding by policy, the Secretary-Treasurer bears the burden of educating executive members. The Secretary-Treasurer can be vulnerable to repeated challenges, questions, and tensions emanating from membership’s lack of information or misinformation, suggesting that this aspect of the Secretary Treasurer’s role should be formalized and adequately resourced.

FSA Position: Chief Negotiator

Eligibility:Any FSA member in good standing

Term:2 years

Releases/Compensation:Varies, 1 or 2 releases in non-bargaining years, up to 5 in bargaining years

Workload:3-5 hours per week over the course of a year; this increases greatly during bargaining preparation and bargaining

Essential Components:

- Lead the bargaining team while in negotiations
- Chair the contract committee while developing the proposal package
- Consult with members to determine bargaining proposals
- Develop a long-range vision for bargaining and the collective agreement
- Provide input into work and decisions that involve modifications to the Collective Agreement outside of bargaining years
- Regularly communicate with Contract Administrators to discuss underlying issues that may inform changes to the Collective Agreement
- Serve on FPSE Bargaining Coordination Committee

Duties:

The Chief Negotiator shall represent the Faculty and Staff Association and lead the negotiations team in matters related to the Collective Agreement. He/she will negotiate the local Collective Agreement with UFV Board Representatives. He/she will convene and chair the Contract Committee (see committees below), survey the membership to determine bargaining priorities, and prepare contract language. He/she shall report on a regular basis to the Executive Committee and to the general membership as required, on all matters relating to contract negotiations.

Discussion:

Up until our failed agreement in 2015, the workload for this position was fairly consistent. During bargaining, it's a heavy workload, but in the off years, it can be quite light, depending on whether there are Letter of Agreement committees or not.

One of the biggest challenges to bargaining has been the lack of a long-term strategy. We are not always successful the first time we tender a proposal to the collective agreement, and by the next time we're in negotiations, the position may have changed hands and direction. Bargaining surveys are a useful tool, but they seem to be most often designed to capture the "heat of the moment" rather than identify long-term strategies.

Another challenge has been that although the Constitution names the Chief Negotiator a member of the Agreements committee, that hasn't necessarily been the practice, and the Chief Negotiator has been left out of negotiations that alter the collective agreement and sometimes tie the hands of the subsequent bargaining team. For example, in 2013, six weeks after the 2012-2014 agreement was ratified, part of the Special Leave provisions were re-negotiated, and the agreement included a provision that the language would be written into the 2014 agreement.

In the 2016-17 academic year, FPSE was focused on developing a strategy for the elimination of secondary pay scales, which involved the Chief Negotiator reviewing collective agreements to develop a historical review of secondary pay scales at UFV (we have several of them). In the coming year, the Chief Negotiator will be undertaking the first ever audit of the collective agreement, examining equity (e.g., gender, workload, benefits), policy congruence, and other potential items to aid in forming a bargaining strategy. This is all outside the traditional non-bargaining period workload for this position.

FSA Position: Communications Chair

Eligibility:Any FSA member in good standing

Term:2 years

Releases/Compensation:2 releases or 1 day/week for staff

Workload:The work in this position is uneven. For example, when an issue of Words & Vision must be published, the Chair has significant work in preparing (editing) the document. The scope of edits varies between different Communication Chairs. (Note: actual production/layout of the newsletter is a component of the CUPE staff)

Essential Components:

- Edit and prepare *Words & Vision* for publication
- Manage content of the FSA website
- Assist President in maintaining good communication within FSA and community allies
- Facilitate communication between officers and members and between members
- Review and edit communications to members from the FSA Executive
- Ensure Communications Policy is respected

Duties:

The Communications Chair will maintain and work to improve regular and effective communications between officers and members, and among members. He/she will assist the President in maintaining good communication between the Association and the surrounding communities as need be. He/she will review and edit printed and electronic communications issued by the FSA Executive to members and the surrounding communities. The Chair will direct the management of content on the FSA website. . He/she will consult with the Communications Committee as needed.

In recent years the focus of this position has been on managing FSA bulletins, *Words & Vision*, and other formal FSA communications. While there has been some discussion about a social media presence, there is no clear communications strategy regarding this. This generates tensions and confusion around various communication activities. The jurisdiction of the Communications Chair is vague, possibly fuelling these tensions.

FSA Position: Faculty Contract Administrator

Eligibility:..... Type B Teaching Faculty, Academic Support Faculty, Academic Advisor,
Director

Term:..... 2 years

Releases/Compensation: Full-time, fully released

Workload: There is a tremendous amount of talk about a heavy and demanding workload for this position. Certainly, the learning curve is high and the need to be available to members requires significant need to set boundaries. Work is flexible, with meetings occurring at various times.

Essential Components:

- Meet with members to discuss workplace concerns and issues
- Train / supervise Shop Stewards
- Liaise with the Agreements Committee
- Initiate grievances, when necessary
- Sit on SACs

Duties:

The Faculty Contract Administrator will be responsible for handling individual faculty matters related to contract and workplace administration. He/she must be familiar with the terms of the Collective Agreement, and with the decisions of the Agreements Committee, and will provide relevant information

and advice to any Association faculty member who has concerns about workplace issues. In consultation with other members of the Executive and/or Faculty Stewards, he/she will initiate grievances when appropriate according to the Collective Agreement and the internal FSA grievance process (See Appendix D for Internal Grievance Procedure). The Faculty Contract Administrator may engage the participation and assistance of the Vice Presidents in any contract administration work. The Faculty Contract Administrator will represent the FSA on SACs and perform the observer role in SACs. He/she will also supervise and provide training for Faculty Stewards.

Discussion:

In practice, the Faculty CA position has evolved beyond what is described in the Constitution's "duties" such that the Faculty CA attend LAM meetings and has been involved in crafting contract modifications. This presents a significant jurisdictional problem because rather than administer and uphold the contract, the Faculty and Staff CAs take part in its reshaping, even outside of bargaining. This places the CAs in a difficult, if not untenable, situation, having to work with management to solve problems and make interpretations of the agreement but also being subject to the uneven power relations associated with being employees "negotiating" with the Employer. It can also create a transparency issue for the executive and for membership. The core role of the Contract Administrator positions is to defend the existing contract, communicating with the executive, particularly the President and the Chief Negotiator those issues that may need to be addressed in contract modifications. However, the CAs should not *lead* in the contract being modified.

Both the Staff and Faculty Contract Administrators require an intimate knowledge of the Collective Agreement, the nature and scope of faculty/staff workloads and working conditions, and knowledge of labour practice. There has been little control over documentation and record-keeping with information about specific cases disappearing when officers leave their positions. This presents a significant continuity issue in managing member issues. Further, the power relationship between Contract Administrators and the Employer places CAs in very difficult situations that could impact their own working conditions when they resume their regular duties.

FSA Position: Staff Contract Administrator

Eligibility: Staff (Type A, C, or D)

Term: 2 years

Releases/Compensation: Full-time, fully released

Workload: There is a tremendous amount of talk about a heavy and demanding workload for this position. Certainly, the learning curve is high and the need to be available to members requires significant need to set boundaries. Work is flexible, with meeting occurring at various times.

Essential Components:

- Meet with members to discuss workplace concerns and issues
- Train / supervise Shop Stewards
- Liaise with the Agreements Committee
- Initiate grievances, when necessary
- Sit on SACs

Duties:

The Staff Contract Administrator will be responsible for handling individual staff matters related to contract and workplace administration. He/she must be familiar with the terms of the Collective Agreement, and with the decisions of the Agreements Committee, and will provide relevant information and advice to any Association staff member who has concerns about workplace issues. In consultation with other members of the Executive and/or Staff Stewards, he/she will initiate grievances when appropriate according to the Collective Agreement and the internal FSA grievance process (See Appendix D for Internal Grievance Procedure). The Staff Contract Administrator may engage the participation and assistance of the Vice Presidents in any contract administration work. The Staff Contract Administrator will represent the FSA on SACs and perform the observer role in SACs. He/she will also supervise and provide training for Staff Stewards.

Discussion:

Like the Faculty CA, this position has evolved beyond what is described in the Constitution's "duties" such that the Staff CA engages in LAM meetings and the crafting of contract modifications. This presents a significant jurisdictional problem because, rather than administer and uphold the contract, the Faculty and Staff CAs take part in its manipulation, even outside of bargaining. This places the CAs in a difficult, if not untenable situation, having to work with management to solve problems and make interpretations of the agreement but also being subject to the uneven power relations associated with being employees "negotiating" with the Employer. The core role of the Contract Administrator positions is to defend the existing contract, communicating with the executive, particularly the President and the Chief Negotiator on issues that may need to be addressed in contract modifications. However, the CAs should not *lead* in the contract being modified.

Both the Staff and Faculty Contract Administrators require an intimate knowledge of the Collective Agreement, the nature and scope of faculty/staff workloads and working conditions, and knowledge of labour practice. Further, there has been little control over documentation and record-keeping with information about specific cases disappearing when officers leave their positions. This presents a significant continuity issue in managing member issues. Further, as mentioned previously, there is a power relation between Contract Administrators and the Employer that places these executive members in very difficult situations that can impact their own working conditions when they resume their regular duties.

FSA Position: Social Committee Chair

Eligibility:Any FSA member in good standing

Term: 2 years

Releases/Compensation:Varies according to the complexity and extent of events in a given year.

Workload:This has increased with changing mandate to invest in member engagement activities. The work is also incredibly uneven, depending on what activities have been planned and what unexpected surprises emerge with event planning.

Essential Components:

- Seek out engagement activities for FSA members that can include:
 - FSA participation in the Welcome Back Summer BBQ
 - FSA Holiday Party
 - FSA Easter Egg Hunt/Event
 - Other member socials, as possible
- Organize a social committee for additional support

Duties:

The Social Committee Chair will be responsible for organizing FSA social events. He/she shall also make regular reports to the Executive Committee.

Discussion:

The work ebbs and flows with this position, with more time required as events approach. The stipend is not adequate for a Social Committee Chair who is organizing a significant number of events. The time involved to make arrangements fluctuates and, depending on the time of year and complexity of the event, the time and energy required can be substantial.

There is currently no repository of projects undertaken by the Social Committee Chair. Such a repository or a manual could outline details of projects to help others step into the role in the future. This would enhance planning by having documentation on precisely how events were organized and who were key contacts. It would also assist in more transparent and regular reporting to membership.

FSA Position: Joint Professional Development Committee (JPDC) Co-chair

Eligibility:Any FSA member in good standing

Term: 2 years

Releases/Compensation:Stipend of \$500/year

Workload:Although workload has been described as 8-10 hours /mo in recent years, it may be decreasing based on most recent reports

Essential Components:

- Co-chairs JPDC
- Organizes and offers occasional professional development workshops

Duties:

The incumbent in this position shall co-chair the Joint Professional Development Committee and ensure that divisional allocations for professional development reflect the Association's and the University's commitment to professional development for all employees of the University. The Committee will consist of members outlined in the Terms of Reference. He/she shall make regular reports to the Executive members on the proceedings of the P.D. Committee.

Discussion:

Feedback about this position suggests a power dynamic with the employer that can be, at times, challenging for representatives. When issues are debated, the representative must be able to stand up and defend the union's position, which may necessitate greater training and support from the union executive.

In the past JPDC had oversight of all PD requests and vetted all requests as a committee. Process was changed to have *supervisors* evaluate and approve PD. Moving to this method has downloaded work to respective supervisors who now require training. It should be a greater focus of the JPDC co-chairs to ensure that supervisors have the best information possible when evaluating requests and access to language to support decisions. Further, employees may need greater training/education about the PD application process and rights to appeal. This requires that the JPDC Co-chair should also be able to access all PD applications to see trends and adjust processes as necessary.

The *Terms of Reference* for this committee outline a responsibility to fund UFV PD events even though many PD activities appear to come from the Teaching and Learning Centre (TLC). There may be a need for the JPDC Co-chair to stimulate discussion on the boundaries of these two groups and consider the effect of centralizing UFV wide PD with a specific department. The dynamics between JPDC and TLC are unclear.

The JPDC Co-chair may also sit on a committee to review faculty sabbatical leaves and another for staff educational leaves. The constitution of these committees is otherwise opaque. This is a problematic transparency issue that should also be examined by the FSA.

FSA Position: Joint Occupational Health and Safety Committee (OH&SC) Co-chair

Eligibility:Any FSA member in good standing

Term: 2 years

Releases/Compensation:\$500 Stipend/year

Workload:

Essential Components:

- Co-chairs the two (2) Joint Occupational Health and Safety Committees (Abbotsford and Chilliwack)
- Responds to and investigates member complaints and incidents re: hazardous or dangerous conditions at UFV
- Participates in workplace inspections
- Monitors the attendance and participation of FSA representatives on both OH&S committees, and provides encouragement and support as needed

- Assists the FSA Administrative Assistant to coordinate nominations/elections of FSA representatives on the OH&S committees
- Assists UFV's Occupational Health & Safety Office in providing educational and training programs on Occupational Health and Safety legislation and issues
- Coordinates with the Associate Director of the OH&S Office in the collection of relevant literature and legislation, such as WCB standards for distribution to members

Duties:

The OHSCC shall co-chair the Joint Occupational Health and Safety Committee(s) to ensure that unsafe, hazardous, or dangerous conditions within the work environment are reported to the University and to respond to and investigate members' complaints about such conditions. The OH&S Co-chair shall make regular reports to the Executive Committee. In consultation with the FSA executive, the OH&S Co-chair may delegate responsibility to another FSA member for participation in OH&S sub-committees, as well as related FPSE committees.

FSA Position: Job Classification Audit Committee (JCAC) Co-chair

Eligibility:Any FSA member in good standing

Term: 3 years

Releases/Compensation:\$500/year Stipend

Workload:

Essential Components:

- Co-chairs JCAC
- Monitors job classification trends
- Educates membership on classification systems

Duties:

The JCAC Co-chair shall serve in a nonvoting capacity and shall co-chair the Job Classification Audit Committee to ensure that the Faculty and Staff Association commitment to the job evaluation system is carried out. The JCAC Co-chair shall make regular reports to the Executive Committee on the proceedings of the JCAC, and from time to time establish suitable forums for providing informational workshops on the classification system to member staff.

Discussion:

There is a significant amount of knowledge and experience needed to perform this role. Ideally, a co-chair would be selected from the JCA Committee as an experienced member. In 2012 a FSA constitutional change resulted in the removal of the JCAC Co-chair vote. A review of meeting minutes suggests there was a concern that the Co-chair can be, potentially, appointed (as described in Article 21.7d of the Collective Agreement). However, it has been the FSA's practice to hold an election for this position.

It should be noted that, similar to other employer-employee joint committees there is a notable power dynamic between the Co-chair and the Employer. The Co-chair must work with the Employer and may require additional support from the FSA to ensure that FSA interests are supported and recognized.

Reporting to the FSA Executive about JCAC activities must be intentional and specific to ensure the FSA has a clear handle on issues and can support the Co-chair when necessary.

FPSE Representative: Non-regular Employees

Eligibility:An auxiliary staff or sessional faculty member in good standing

Term: 1 year

Releases/Compensation Time-sheeted maximum of 125 hours at the prevailing sessional/auxillary rate. FSA also provides \$1,000 for their committee for costs relating to any events that they organize.

Workload:

Essential Components:

- Attend FSA Executive meetings
- Attend FPSE Non-regular Employee meetings at FPSE 2x/yr
- Write regular reports for Words & Vision and an annual report
- As time and resources permit, communicate with non-regular employees to identify issues to be addressed to the FSA executive.

Duties:

The Non-regular representative shall promote the interests and needs of non-regular employees and, when feasible, chair a committee to address both the current and future needs of non-regular employees and shall make regular reports to the Executive Committee.

Discussion:

Like the other FPSE representative positions, a two year term would offer greater stability to this role and provide better continuity and opportunity to address issues. However, due to the changing status of non-regular members, representatives may not be eligible as members of the FSA from one year to the next. It may be worthwhile to consider a 2-year term, pending ongoing membership status.

FPSE Representative: Human Rights & International Solidarity

Eligibility:Any FSA member in good standing

Term: 1 year

Releases/Compensation: FSA provides \$1,000 for their committee for costs relating to any events that they organize as well as for replacement costs.

Workload:

Essential Components:

- Attend FSA Executive meetings
- Attend FPSE meetings (twice a year)
- Seek out opportunities to raise human rights awareness (e.g., events)
- Provide regular reports in Words & Vision & an entry in the FSA Annual Report
- Build relationships, when possible, with other committees/community groups

Duties:

The Human Rights and International Solidarity representative shall promote human rights protection and education among the faculty, staff, students and administrators and, when feasible, chair a committee including faculty and staff and shall make regular reports to the Executive Committee.

Discussion:

Aside from FPSE and FSA Executive meeting attendance, this position is relatively flexible. Similar to other FPSE representative positions, there has been concern that a one year term is rather limiting. By the time a representative has gained some experience, the term ends. If the term is extended by another year, there is opportunity for representatives to apply their knowledge more precisely in the second year. Further, this may create “space” in the position to allow greater mentorship and information sharing opportunities for the representative’s successor.

FPSE Representative: Status of Women

Eligibility:Any FSA member in good standing

Term:1 year

Releases/Compensation:FSA provides \$1,000 for their committee for costs relating to any events that they organize as well as for replacement costs.

Workload:

Essential Components:

- Attend FSA Executive meetings
- Attend FPSE meetings (2x / yr)
- Seek out opportunities to raise status of women rights awareness (e.g., events)
- Provide regular reports in Words & Vision & an entry in the FSA Annual Report
- Build relationships, when possible, with other committees/community groups

Duties:

The Status of Women representative shall promote activities which contribute to an improvement in the status of women. Such activities should address both the current and future needs and interests of women. The Chairperson shall, when feasible, chair a committee including faculty and staff and shall make regular reports to the Executive Committee.

Discussion:

Similar to other FPSE representative positions, there has been concern that a one year term is rather limiting. By the time a representative has gained some experience, the term ends. The FSA also bears the cost of training at FPSE’s request. If the term is extended by another year, there is opportunity for representatives to apply their knowledge more precisely in the second year. Further, this may create “space” in the position to allow greater mentorship and information sharing opportunities for the representative’s successor.

FSA Position: Steward

Eligibility:Any FSA member in good standing

Term:1 year

Releases/Compensation:\$350 annual stipend

Workload:

Duties:

Stewards shall represent fellow members under the guidance of the relevant Contract Administrator and promote union consciousness and values in the workplace. They will communicate and disseminate official union policy, communications, and directives to members in their area.

Discussion:

Interestingly, Stewards have a great deal of role clarity in Appendix D of the FSA Constitution. Duties are encompass:

- responding to inquiries from fellow members about their rights and responsibilities under the Collective Agreement;
- representing fellow members under the guidance of the relevant Contract Administrator;
- being informed about official union policy and being prepared to answer members' questions under the guidance of the relevant Contract Administrator;
- identifying emerging issues and/or possible contract violations and report them to the Contract Administrators;
- promoting union consciousness and values in the workplace;
- meeting with the Contract Administrators as required;
- preparing preliminary "case" documents for the Contract Administrators and/or the FSA executive; and
- acting as an advocate ("helpful friend") to those involved in informal and formal grievance procedures.

When asked in the 2017 Steward Survey for suggestions on improving their experience they proposed:

- a Steward training manual;
- more involvement and broader training with FPSE;
- access to labour / legal advice; and
- regular meeting opportunities to discuss issues and develop greater knowledge.

Appendix H: FPSE President's Council Survey

FSA Operational Review – President's Council Member Survey

Greetings Members of President's Council:

The Faculty and Staff Association at the University of the Fraser Valley is beginning an unprecedented operational review of itself. The purpose of this exercise is to “understand what the architecture of the FSA must be to ensure sustainable, equitable, and healthy working conditions at UFV.” As part of this process, we will be evaluating executive roles, responsibilities, and mechanisms that are intended to enable their work (releases, compensation, etc.). It would be ideal for us, and anyone interested in similar work in the future, to understand the executive contexts of other FPSE members. Consequently, I am humbly seeking input from you, as representatives of your own locals. I have developed questions that I hope you might be willing to answer about your executives to facilitate a greater understanding of how you manage your association's objectives and, perhaps, how you balance the realities of “getting things done” with the complexities associated with elected positions and volunteerism.

The questions are exploratory in nature so please feel free to answer them in a way that seems relevant to your situation.

It would be incredibly helpful if you could send me your responses by January 15th.

Christina@neigel@UFV.ca

1. What local do you represent?
2. How long are the terms for your executive positions?
3. Which positions on your executive receive releases or compensation for union work? (Identify positions and nature of releases/compensation)
4. Are there changing issues for your executive that have (or may) result in changes in the way work is assigned/delegated for your executive?
5. If you could adjust the ways work is supported to the executive, what kinds of adjustments might you make?
6. How does your local ensure that it is meeting the needs of members? For example, how do you determine if you are handling member issues effectively?
7. How do you review your structure to ensure that it is effective?
8. Do you have any other comments regarding the way work is distributed among your union executive members?

Appendix I: CUPE 1004 Job Descriptions

APPENDIX “B”

UNIVERSITY OF THE FRASER VALLEY
FACULTY AND STAFF ASSOCIATION

SUPPORT STAFF POSITION DESCRIPTION

April 2011

Position Title: FSA Administrative Assistant, Procedures & Liaison

Purpose: Under the general direction of the President, facilitates the effective operation of the FSA office; provides administrative assistance to the President, and administrative-secretarial support to FSA executive members where necessary.

General Administrative Responsibilities:

- Covers for the Administrative Assistant - Financial on their regular days off or when on vacation/leave through mutual agreement with the Employer.
- Assists the Administrative Assistant - Financial during busy work times first recognizing their own job duties as a priority.
- Works with the Administrative Assistant - Financial to organize any FSA funded social events.

Specific Duties:

- Facilitates the effective operation of the FSA office by initiating office management policy; setting up and maintaining office processes and procedures and working closely with members of the Executive to streamline processes as required.
- Acts as initial contact for internal and external visitors to the FSA office, provides diplomatic and helpful responses to routine enquiries, referring to appropriate authorities and notifying them as necessary.
- Responds to members' requests, exercising judgment and discretion in problem solving where possible, ensuring confidentiality when appropriate, and in notifying appropriate executive member in a timely manner.
- Provides continuity during transfer of authority from outgoing executive to incoming executive by providing information and explaining processes and procedures.
- Provides administrative assistance to the President, reports to executive as to status of office management, and acts as support for action with President.
- Provides continuity in President's absence, exercising initiative and judgment to ensure that matters requiring immediate attention are handled in an effective manner.

- Assists President and Executive in procedural functions such as responding to routine enquiries, drafting replies to general correspondence under instructions from them, replying to and signing routine correspondence.
- Assists in the production of the FSA newsletter; compiles articles for submission, prepares copy for editing using desktop publishing software, ensures all publications meet design standards and FSA requirements and arranges printing and distribution to outside organizations.
- Provides administrative support to a variety of FSA general membership Committees such as: Executive, Labour and Management AGM, Bargaining, Social and other ad-hoc committees where required. Booking meeting rooms; compiling and distributing meeting packages; assisting in preparation of agendas; distributing minutes and attachments; arranging catering where necessary.
- Responsible for all processes related to FSA Joint Committee elections by initiating and distributing nomination forms and ballots, compiling results and informing Committee Chairs and membership.
- Responsible for scheduling appointments, coordinating activities, maintaining FSA calendars/itineraries, organizing travel and accommodation arrangements.
- Compiles and collates statistics for reports, FPSE, Statistics Canada, and other groups as needed, submitting documents to Registrar of Companies and filings constitutional changes to the By-Laws.
- Word processing: typed copy and rough draft, general instructions, notes or dictation, a variety of materials requiring knowledge of FSA procedures such as general correspondence, memoranda, reports, proposals, confidential materials, administrative forms, statistical tables.
- Coordinates meetings with FPSE as required, assists with reports or research information as required by them. Contacts FPSE and other Locals when information is required.
- Assists with organizations of Annual Transitional Meeting, researching facilities and costs involved, preparing information packages and Executive binder for distribution to Executive.
- Establishes and maintains filing systems; membership contracts, office records, confidential files, policies and procedures, government publications and other related library resource material.
- Participates in purchase of office equipment and determines needs for maintenance and repair. Maintains a stock of office stationery and supplies.
- Performs a variety of clerical tasks such as photocopying, receiving and distributing mail, preparing outgoing mail, distributing incoming bulk mailings and distributing information packages to membership as required.
- Maintains records of office keys to ensure security.
- Coordinates and assists in assembling handbooks/brochures for FSA members.
- Schedules forums as required.
- Assists the Executive in other projects as required.
- Provides administrative support to the Contract Administrators with regards to the Area Stewards; distributing nomination forms, compiling results and informing Contract Administrators, scheduling meetings, preparing agendas, taking minutes and providing other information when required.

Website and Technical

- Operates and maintains the official FSA Website as “Website Administrator.”
- Liaises with UFV’s Employee Services and accesses HR Banner Database to maintain FSA membership database.
- Keeps abreast of and researches emerging hardware, software, functionality improvements, and web technologies through communication with ITS, UFV’s Website Administrator.

APPENDIX “B”

UNIVERSITY OF THE FRASER VALLEY

FACULTY AND STAFF ASSOCIATION

SUPPORT STAFF POSITION DESCRIPTION

April 2011

Position Title: FSA Administrative Assistant - Financial

Purpose: Provides support to the Secretary-Treasurer and President by handling accounting and financial responsibilities of the Association and assisting with the preparation of the annual budget, the purchase of major equipment and software, and the annual review.

General Administrative Responsibilities:

- Covers for the Administrative Assistant - Procedures & Liaison on their regular days off or when on vacation/leave through mutual agreement with the Employer.
- Assists the Administrative Assistant - Procedures & Liaison during busy work times first recognizing their own job duties as a priority.
- Works with the Administrative Assistant - Procedures & Liaison to organize any FSA funded social events.

Specific Duties:

- Financial - Secretary-Treasurer, President, Finance and Administration Committee
- Responsible for bookkeeping duties, including completion of all account reconciliations, such as bank reconciliations on microcomputer using accounting software.
- Responsible for timely reporting of financial information, progress reports, and other financial calculation reports as required (monthly, quarterly, annually), as requested, and responds to questions regarding details of revenues and expenditures.
- Responsible for the preparation of the preliminary budget proposal for discussion with, and review and revision by, Secretary-Treasurer and FSA Executive, and makes recommendations regarding budget line items, especially office purchase needs, social planning.
- Responsible for identifying and creating useable and meaningful financial reports and tables.
- Assists the Secretary-Treasurer with any special projects, as required, including various types of analysis, including, but not limited to, dues increase analysis, budget-to-actual analysis, and general ledger account analysis.
- Monitors office equipment and furniture needs, software and hardware upgrades and peripherals, researches options, communicates with vendors, and makes recommendations for purchase.

- Liaises with UFV Employee Services and authorizes requests for contracts and time sheets for executive releases and forwards to Payroll Department for payment.
- Attends meetings of the Finance and Administration Committee, as required and takes any notes for follow-up action and reporting to the FSA Executive.
- In the event of a strike, receives strike pay funds from FPSE, assists in developing payment policy and schedule, and calculates and issues strike pay cheques to members.
- Monitors office staff Professional Development funds, as per Collective Agreement, and prepares reports as required for Staff PD Committee, Finance and Administration Committee, and/or FSA Executive.
- Follows all aspects of financial policies with respect to donations, releases, loans to members, Executive Professional Development, and others.
- Liaises with the FSA accounting firm and assists with the annual review by performing such tasks as preparing year end working papers and the electronic accounting records, responding to questions and correspondence from the accounting firm regarding such matters as financial policies (FSA Constitution, office staff Collective Agreement), marked changes in expenditures, and discusses and reviews audited/reviewed statements and final report with accounting firm.
- Reviews all expense claims and bills, monitors social planning budget, such as FSA Executive Transitional Meeting and AGM, and writes cheques. Monitors bank account(s) balance(s).
- Ensures cheque signing officer forms are completed.
- Arranges and maintains bonding.
- Receives and monitors regular membership dues received and follows up on collection of dues from members on WorkSafeBC, LTD or members in temporary secondment to excluded positions.
- Searches for good investment options for the Union's funds and recommends them to the Secretary-Treasurer and Executive committee.
- Provides support to the Secretary-Treasurer and Finance Admin Committee which includes: scheduling meetings, booking facilities, compiling and distributing finance meeting packages, assisting in preparation of agendas, taking minutes, distributing minutes and other attachments, arranging catering where necessary.

Technical:

- Works with other technical experts to purchase, discuss, and recommend software and hardware purchases.
- Purchases and implements software and hardware upgrades and peripherals, and performs or oversees maintenance as required.

Appendix J: Records Management Report

Report by Patrick Miller

Importance of Records Management for the FSA

While having a records manager or records management policy may seem like an expense that doesn't need to be incurred, many organizations have rued the day they found themselves in legal difficulties and did not have one. Records managers help sort out an institutions files and to prove that retention cycles were followed. It's a case where it's better to have and not need, then need and not have.

The FSA is best served with a strong records management policy to protect itself against Section 12 charges. Section 12 relates to the Union's duty of representation of its members. It's a serious charge that accuses the Union of acting in bad faith and not in the best interest of its members. Proper records management can help prove that the Union has been operating in such a manner as to fully represent the membership to the extent of their abilities.

Records management can also help with the FSA's interaction with the University. When it comes time for the Union to enter bargaining negotiations with the University, a strong records management policy can help. It opens the door for serious research to be conducted into the issues that the union faced throughout the last collective agreement, identifying what were the persistent type of grievances or issues voiced by members and so forth. This type of information can help form the basis of arguments brought to the table to secure a better agreement. In step with using records to inform bargaining positions, they can be used to fact check decisions or statements raised by the university that directly effect our members. The Union must not assume that everything the university states is entirely accurate. By being able to research within our own records to find what we believe to be the truth we can work with the University to encourage them make a correct statement.

In lieu of a proper archive, or archival policy, the records management polices can step in to ensure that historical documents relating to the Union are saved from destruction. Typically, such files expand past the scope of those simply required by law to be kept and into the realm of documents important to historical memory of the organization. This applies not only to physical files but electronic files too. In terms of preservation a digital copy does not replace a physical copy of a rare item relating to our history, but supports it by making it more accessible to membership. A proper records management policy would outline what items should be considered a priority to preserve and undertake measures to keep them safe for the future.

The State-of-Affairs in January 2017

In January 2017, the office was doing a functional job of ensuring records management principles were being followed. I say this not to denigrate the abilities of my colleagues, far from it, considering the amount of work that they are continuously having to balance. The records were in a much better state than they could have been. But there was room for improvement. The office did a good job ensuring that electronic and physical documents were being saved in a manner that made for easy location and

retrieval. These included but are not limited to financial documents, agendas, minute, words and vision. Tanja and Harman have both developed filing structures that suited the each of them and how they work with the files. It also must be said that the staff in the office were diligent about ensuring that no confidential records were left laying in the open and unattended.

One of the first things I found of concern was office security. As this office is where most of our records are held, I felt that as records manager I could explore the issue of replacing locks. My decision was prompted after several occurrences where I discovered some executive members were allowing themselves entry into the office when the door was locked. The office staff also spoke to me about their uncertainty regarding the number of keys in circulation to the office. I created a report on the situation along with cost figures for various improved locks to the president. From there approval was given to change the locks and only provide keys to office staff.

Another was the state of the records concerning member grievances. There was no standard to the information found within each of the members files. Some files were filled with all the correspondences and notes taken by a contract administrator, while others had so little documentation as to give no indication of the grievance or resolution. Nor was there a clear accounting of what files were in the office, or in the contract administrator's offices. As well, there was no system to record what files were leaving the office in the temporary possession of a Contract Administrator.

Other lesser issues of concern included moving away from storing our records on the UV shared G drive. While there is no evidence of the University having access these files, it seems sensible to look for alternatives than continuing to use the UFV provided drive. Also, there was some internal office security that needed to be addressed, including the locking of cabinetry and computers when not in use.

My Activities in the Role of Records Manager

In my role as Records Manager I've undertaken a targeted approach to the reorganization of several areas within the office and FSA. The larger reorganization and tasks have included, but not limited to, the building of a repository in Laserfiche and populating it with electronic copies of documents. While easily summarized are far from easy to fully implement.

Before going into detail about the Laserfiche repository, some explanation of what Laserfiche does is in order. Laserfiche is a records management program that is extremely powerful and allows large organizations to streamline the various stages of document management; from creation, retention, and ultimately to destruction. Most documents that are uploaded allow for text searching, and some level of editing and auditing, for example redacting sensitive or keeping a log of who has accessed the file and when. The FSA is using a form of Laserfiche that is very much a pared down since it doesn't need the more complex applications. Everything that is uploaded to Laserfiche is saved on a private off-site server that is regularly backed up. The server is located within Canada and therefore is not subject to the same invasive laws that servers based in the United States are.

Getting Laserfiche set up took a great deal of patience and communication between myself, FPSE, and RICO who own the Laserfiche tool. This was because we are piggybacking our license off FPSE and we

had to work through them to arrange both payment and set up. Additionally, I worked with RICO to organise basic training into the use of Laserfiche for CUPE office staff. Since then I have worked with my contact at RICO to help troubleshoot minor problems as they arise. To assist those less familiar with Laserfiche within the office I have begun to create a simple instruction manual for the program.

I gave much thought on creating a file hierarchy that was both logical and navigable and not byzantine. The more logical and navigable it is, the easier it will be to encourage its use. The harder it is to use; the more likely staff are to resent using the program. From there I began to acquire all the files that I could which would be populating this repository from Tanja and Harman. Any files that did not have an electronic copy had to be scanned. Most of the scanning required was for LAM meetings, Words and Vision and grievance files. To date, over 100 Words and Vision newsletters have been digitized, and over 50 grievance files have been digitized.

To further improve the consistency and discoverability of all the files, I implemented a file naming convention. This is an extensive document that has been shared amongst office staff as they are still producing files for upload into the Laserfiche. Working in conjunction with this file naming convention document, I renamed well over a thousand files to adhere to the new conventions. There are more to go, but they need to be discussed with Tanja and Sean as to their importance and need to be saved.

As previously mentioned, a lot of work has gone into scanning our collection of Words & Vision for Laserfiche. Slowly the FSA is getting a comprehensive digital collection of their newsletter. There are still plenty of volumes that need scanning which will occur over the summer. It is important that we have this for a few reasons. It's a vital part of our identity as a union and holds much of our history, especially from the earliest days of the union. It will allow research to be undertaken into how long certain issues have been of concern to the union and other topics. Additionally, I hope it becomes a source of inspiration for content for future Words & Vision to make them more engaging beyond simply publishing official executive reports.

With the Words & Vision Laserfiche Project well underway I've taken on a side project, under my own initiative, to upload the very same digital copies to Internet Archive. Internet Archive allows us to maintain full ownership of the items but providing the world with access to the files for online viewing, or downloading. Our Internet Archive collection of Words & Vision has been shared with various Universities that offer a Labour Studies program. One Labour Studies departments expressed great interest in using it for research by their faculty and for student projects. As I continue to upload more newsletters to Laserfiche, so too will they be uploaded to Internet Archive.

In conjunction with the digital record keeping, I implemented a few changes to help make our physical files easier to locate and interpret. I've transferred all the files from their tattered and worn folders, to new ones. I've implemented a labeling system to each folder that lists the name of the griever, the issue and the year. All the grievance files that were in the office, have been relocated into one centralized filing cabinet. The files within this cabinet are organized by year and then in alphabetical order within

each year. This filing cabinet is locked at all times. Should anyone need to remove a grievance folder from the office they must complete a sign out form.

Some of these grievance folders are quite spartan in their contents and fail to give a reader any sense of the who, what, where, when, why, and outcome, I developed a Grievance summary form to help solve this. This summary form is to be included with all new grievances that are closed. This form is easily completed by the contract administrators but provides any future readers of the grievance an at-a-glance summary who was involved, who handled the case, the original issue, the resolution, and at what stage the resolution was reached.

I've also taken steps to ensure that the office and our sensitive materials are protected. This comes in the form of having have the office door locks changed. The need for this was prompted after I discovered some executive members were allowing themselves entry into the office when it was closed. The office staff also expressed concern about the number of keys in circulation to their office. Now only the immediate office staff have access to the office. Within the office, a new lock box was installed to house all the keys to the various filing cabinets and cabinetry. For the contract administrators, I worked with Tanja to purchase portable lock boxes for member grievance files. These measures should ensure that the risk to our records is minimal unless some individual undertakes a concerted effort to break into the office.

Finally, I have been lending assistance wherever and whenever I can to the office staff and wider FSA. This has taken the form of general office assistance, such as building surveys, organizing the space, cleaning the message board, helping get students to sign pledge cards, and so on. I've also helped set up executive meetings take over office responsibilities of the other CUPE staff when they are unavailable or away. Additionally, I spent a lot of time to the running and conclusion of the 30 Drops in the Bucket campaign.

Continuing Problems in the FSA's Work Routine

The FSA has been suffering through several organizational handicaps that slows the flow of records between those that are creating them, those that need to use them, and ultimately the records manager who plans for their storage. One such handicap that I've seen happen is the persistent desire to create ad-hoc or sub-committees to consider issues on the fly. These groups typically do not have any sort of clearly written mandate or terms of reference that can be saved for easy recovery, for example the recently struck group researching the consensus model for the executive. The lack of a clear mandate, in my mind makes any documentation that these groups create suspect in their enforceability. This is because there is no easy way to compare what they produced to a mandate and to determine if they have overstepped their bounds or not.

The FSA also manages to experience the opposite problem to a lack of a lack of documentation, namely an overabundance on certain issues. This can be as debilitating as the lack of documentation. One prime example of this are the electronic bargaining notes files I received, where new files seemingly made whenever even minor edits were done to a document. Anyone looking at these files spends extra time

sorting through these surplus files that have a debatable usefulness when there is a final version of the document available.

The way the FSA currently handles all active records is bordering on the unmanageable. As far as I can tell records that are active, meaning they are still being used and worked on, are shared or kept not only in email but also Dropbox, USB sticks, physical copies, individual desktop accounts, and the G drive. Not only does this end up clogging the various services of their space, for example the storage limit for a UFV email account, but also means that locating files can take time if someone forgets exactly where they put the file.

Another problem I have personally experienced is important documentation being dropped off at the office for storage. But the individual dropping off the file does not explain what it relates to, where it should be stored, and so forth. This then requires me to spend time tracking the individual down and speaking to them about the file. It shows that while there is a general desire to store documents, staff have not yet become accustomed to thinking of what information is needed to ensure that the file is properly stored.

The FSA needs to do a much better job when it comes to the preservation of items that speak to the history of the Union and are not just considered essential to the daily operations, or those required for legal reasons. Often, as in the case of posters we create, they are used and then discarded once the event is done. No thought is put into preserving at least a single copy for our records. When this happens, gaps begin to appear in our history where documentation is scant or nonresistant. Ephemera of this nature is difficult to replace, often relying on the simple good fortune of members that happened to have kept a copy.

Executive Members Communication and Record creation

Since becoming the FSA's records manager I have noticed a disconcerting trend within the executive who sometimes have a skewed sense of ownership of documents. This inhibits the sharing of necessary information among concerned parties because artificial barriers are placed on documents by the person in possession of them. Contract Administrators are keeping a particularly tight grasp on their grievance files and not divulging their documents or even simple details, for example names or case progress, to senior FSA leadership. This is in spite of the fact that senior leadership have the right to access these documents and to be kept informed. The need by senior leadership need to view these records is not to satisfy some base level curiosity, but to ensure protocols are being followed and to influence higher level political decision making.

I have also noticed that in some cases files have marginalia or hand-written notes included in that make sense only to the original creator. These notes are useful for unlocking internalized memories but do not help potential future successors make sense of the information they are reading. The FSA executive should become more mindful that if something is important, it should be written down in a clear language, and not stored internally. Internalized knowledge is subject to being forgotten; corrupted by false memories, or lost when the person who has it moves on, retires, or passes away. The gaps that this creates is not easily filled by the FSA, if it ever can be. Another example of this is the last few issues of

Words & Vision were produced by a non-executive member and the raw files are currently stored on an off site personal computer. Currently we have been unable to recover possession of these files.

Overall, for the records manager, this lack of communication and sense of possession hinders their job. This is because they are kept in the dark with no clear understanding on the current volume of records being produced and when they will be submitted to for storage and digitization. Files might come in as a trickle or as a torrent depending on executive members habits of shipping files to the office. This affects the records managers ability to work on other projects for the FSA.

Requirements for Long-term Records Management at the FSA

For records management to take root and be a long-term success the FSA will need to continue to keep the idea of actively saving records at the forefront of it's collective mind. The FSA executive must also remember that the work that they produce while in their roles does not belong to them personally. It is the FSA's and the executive must ensure that what they produce can be interpreted by any potential successor. This means that when new committees or groups are being formed, that proper documentation about their organization and purpose is kept, along with anything they produce as part of their mandate. For Contract Administrators, it means ensuring that when a case is closed, the files kept are clean and free superfluous documents; that all official letters are included, and that a completed grievance summary form is attached which explains the overarching course of the grievance from the issue to the solution.

To ensure that all the files being generated by the FSA are being sent for long term storage, a centralized collection point should be created, such as using a cloud based system such as Dropbox or Sync, which is a Canadian version of a Dropbox type system. Such a centralized spot would allow for groups to work on files within their own folders and then simply move the completed file to a shared folder in the Cloud system that the records manager has access to. This way the records manager isn't burdened by sorting through unnecessary files and groups can work within their own private space making and editing files how they see fit.

Senior FSA administration should work to develop a collection policy that describes the types of records that they would like to preserve not only within Laserfiche but also as physical documents. The records they choose need not only be legally required documentation but ones contribute to or show the history of the Union. This is especially relevant considering that the FSA is soon reaching a major milestone of 50 years in existence. A collection policy will also help guide the executive and all their committees and groups in knowing what documents to share with the records manager to include in the repository or in the office. It would help manage the limited space that the FSA office currently has to work with. Should UFV develop a Special Collections department, it could be useful to consider a partnership with them to store some of our material, for example the Words & Vision collection or advertisements for UFV FSA events.

Appendix K: FSA Strategic Plan

STRATEGIC PLAN 2016 - 2021

February 2017

MISSION

The mission of the Faculty and Staff Association is to promote and protect the welfare and professional interests of the association membership.

CORE VALUES

We measure our success by the improvements for those members who are most vulnerable. We will protect the rights of our members and the integrity of our collective agreement. To this end, the Faculty and Staff Association is guided by the following values:

Accountability

We demonstrate competence in our representation of members. We engage in regular assessment of our actions and activities. We practice responsible stewardship of association resources. We operate in a transparent manner.

Collegiality

We work to promote an environment where responsibility and authority (including governance) is shared among our members, as well as with the Employer.

Consensus Building

We seek to mediate our differences through building consensus; in other words, we work with our members to find an end result that they can live with without compromising the interests of other members.

Diversity and Inclusiveness

We respect and accept the diversity of our members, and we celebrate the richness of our differences. We strive to provide a safe, nurturing and positive space in which we can explore these strengths and differences. We work to provide an environment where all members, particularly those who might otherwise feel excluded or marginalized, are included. We are committed to ensuring a work environment free from discrimination, harassment and bullying.

Due Process and Natural Justice

We work to ensure that all our members are afforded the equal and fair process accorded them by law and our collective agreement. We rely on principles of natural justice to ensure due process: audi alteram partem, or “the duty to give persons affected by a decision a reasonable opportunity to present their case” (i.e., the right to be heard); and, nemo iudex in causa sua debet esse, or “the duty to reach a decision untainted by bias.” (https://www.concordia.ca/content/dam/common/docs/policies/official-policies/2011_Natural_Justice.pdf)

Engagement

We actively promote solidarity and members' commitment to the association and its goals by educating members, building and supporting relationships between members and the association, and by encouraging and providing opportunities for members to act on that commitment.

Equity

We seek to be fair, unbiased, and just in our actions. We will endeavour to ensure that all members have access to the resources, opportunities, power and responsibility necessary for them to reach their full potential.

Fair Process

We believe in involving members in the decisions that affect them. We will seek members' input and provide the opportunity for peer review. We respect individuals for their ideas. Where appropriate, we clarify expectations arising from decisions.

Integrity

Our actions and decisions are based on honesty and a strong commitment to moral principles and social justice. Our goal is always to do the right thing, regardless of the consequences. We adhere to the highest standards of conduct.

Respect for Democracy

We operate on the principles of democracy, which include: 1) the active participation of our members in the work of the association; 2) free and fair elections of representatives; 3) protection of the rights of our members; and 4) equal and fair application of policies and procedures.

Respect for Members' Autonomy

We respect our members' capacity to make informed, un-coerced decisions.

Transparency

We seek to operate within an environment of openness and accountability. It is important that our members understand the rationale behind our decisions and actions, and that we take responsibility for those decisions and actions. Communication among members is vital in ensuring transparency.

VISION TO 2021

The vision of the Faculty and Staff Association for 2016 to 2021 has two main areas of focus.

First, we envision members with a greater understanding of each other and engaged in the association through events and as well as knowledge of leadership and issues evidenced through solidarity. There will be greater access to information and records for members across institutions and access to the history of the FSA.

Second, we envision a healthy relationship between the University and the Faculty and Staff Association. This will be evident through the Employers' consultation with the FSA regarding institutional needs and

decisions. The FSA will be valued for its input on jobs, benefits, and employee health and wellness. Workload issues will be resolved and the FSA will be involved in academic co-governance.

STRATEGIC INITIATIVES FOR 2016 - 2017

Member Engagement

Building shared values and solidarity through activities and events.

Labour-Management & Governance

Addressing workload issues; building relationships between the association and the UFV Board, faculty councils, and students; offering training for members engaged in association activities; sharing information and consulting with members.

FSA Operations

Reviewing executive structure; focusing on communication; improving records management; addressing constitutional changes.

GOALS AND ACTIVITIES FOR 2016 - 2017

Member Engagement

Increase communication via:

1. Issues-based forums, e.g., workload, job descriptions, non-regular members, and other issues reflecting member concerns &/or rights
2. FSA participation at New Employee Orientation (late August)
3. Conduct surveys of the membership to establish priorities (once per semester?)
4. Focus on members' health and wellness:
 - Bring back fitness challenge
 - Hold social events (4 times/year)
5. Get support from management for events (e.g., nature walks, bowling, fantasy football pools)

Labour-Management & Governance

Priorities for Labour-Management include:

1. Establish bargaining priorities (long-term vision, preparation for 2019)
2. Fund staff ad hoc meetings regarding collective agreement rights, policy changes & updates
3. Establish new member welcome/orientation/lunch with executive member
4. Create member guide/virtual union card/outreach information

Priorities for Governance are targeted at the UFV Board, Senate, faculty councils and students and include:

1. Advocate for thorough consultation
2. Set up “shadow” Senate/Department head meetings to examine/explore alternative narratives for members serving on those bodies
3. Meet regularly with UFV Board chair (“Happy” meetings, focusing on community, charities, other joint interests) to build a congenial relationship
4. Resist attempts to divide issues into union vs academic issues

FSA Operations

1. Develop communications strategy
2. Streamline the process to approve and send member bulletins
3. Create a strategy on what issues we want to communicate/report on this year
4. Create themes for Words & Vision
5. Implement a records management system
 - Create and post job description for records management technician
 - Create database and complete data entry
6. Complete review of executive structure
 - September: form small subcommittee
 - October: develop scope questions
 - November to February: collect data (stats, descriptions, interviews)
 - March/April: complete data analysis
 - June: generate report
 - June/July: external review
 - July to September: review the election process and position terms (i.e., when which positions are up for election; even out the overlap). This requires constitutional changes for approval by the membership at next AGM
 - October: member forum for funding
7. Convene constitutional review committee (September 2016)

External Review Report – FSA

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Thank you for the opportunity to review your Association's structure and operations.

At the outset, let me say that it is wonderful to see your Association undertaking this important endeavour. Far too few unions engage in serious self-reflection about their internal structures and processes. I hope my external eyes and analysis will help your Executive to fulfill the aspirations of your members as this review process unfolds. Let me also say that the author of the self-study deserves a hearty congratulations for all of the time and careful analysis that went into the document. It was a pleasure to read.

As a faculty union activist and scholar interested in the organization and politics of labour unions, it was a pleasure to read the very thorough and thoughtful self-study document. In my own Association, the Brock University Faculty Association, I have served as Communications Director, Grievance Officer, Chief Steward, and as a Member-At-Large. I have also published research of faculty unionization and faculty associations as distinct types of labour organization. My own union experiences and my research on faculty associations very much inform this report.

In this report to the FSA Executive, I have taken the liberty to respond to each recommendation contained in the self-study, indicating concurrence or non-concurrence with the recommendation along with reasons and/or other points for the Association Executive to consider as it moves forward with the important task of renewal. I am more than happy to clarify any points that may need to be fleshed out, so please do not hesitate to contact me further.

Executive Structure

Recommendation 1: Restructure the FSA Executive

I do think restructuring is necessary and that a restructuring that is driven by a desire for greater member involvement/engagement is a good thing, but I am not sure I agree with some of the details of the restructuring envisioned in the self-study document.

I reject what I see as a false dichotomy in the proposed restructuring between “political” and “constituency-based” positions on the executive. All positions are, to some extent, political. Arguably, constituency-based positions are the MOST political (see comments on recommendation 7). That said, the idea behind this type of restructuring – that the new VP positions “would be more intimately involved in planning, coordinating, and relationship building” is sound and worth serious consideration.

The VP Member Engagement is an excellent idea. However, I am not sure I understand the logic of having both a Chief Steward and a VP Grievances. While I fully support doing away with the Contract Administrator positions, the work and areas of authority between the VP Grievances and the Chief Steward could seemingly overlap quite a bit. This arrangement, in my view, could create power struggles in an area where a clear chain of command is essential. Instead of having the stewards elect the Chief Steward, instead have the membership elect the Chief Steward and have that person fulfill the combined roles of Chief Steward and VP Grievances. This configuration would be a lot work for one person, but the suggested reconfiguration seems only to duplicate roles unnecessarily.

I do think an executive of 15 is quite large for a faculty association, especially a midsize one. There are obvious ways it could be reduced. For example, I wonder if it is necessary to have the Co-chair, Joint Classification and Audit Committee and Co-chair, Joint Professional Development Committee as members of the executive? These are not typical positions you would see on a union executive and their job descriptions are unclear.

I also think the FSA should strongly consider a VP Equity position that could combine status of women, human rights and international solidarity along with other equity-focused areas. This type of VP position could also help engage different kinds of members in the work of the FSA.

Finally, I wondered about the proposal for Member-at-Large positions for Regular Staff, Regular Faculty, and Non-Regular Employees, but seemingly no reserved space for representing the interests of other, smaller, segments of the bargaining unit, like librarians? It would seem to me that Faculty and Staff are already the two largest demographic groups within the FSA. If that is indeed the case, why would there be a need for special representation for those groups? Is it because of a perceived lack of representation or balance, or because of a demonstrated lack of representation or balance? The FSA should make changes accordingly based on evidence and needs and make every effort to include members who do not belong to the dominant occupational categories in the bargaining unit.

Recommendation 2: Empower Steward roles by creating a clear and formal training/mentorship process for Stewards.

Enforcement of the collective agreement is one of the core functions of a union, so an effective and well-functioning steward system is essential.

Mandatory training and a clear reporting/accountability structure is essential. The FSA should strongly consider establishing a formal stewards' council overseen by the Chief Steward or VP Grievances (see recommendation 1). A body like this, with clear terms of reference, could go a long way in meeting your stewarding needs.

Recommendation 3: Develop detailed job descriptions for all FSA executive positions.

I agree with this approach. In addition, this is important so that people running know what the job entails, but it also helps the people in those positions know what is expected of them. Detailed job descriptions can also help to enhance accountability.

A brief note of caution, however. Do not write the job descriptions with the current people in those positions in mind. Every member brings a different skill set to a particular position, but members come and go. In short, you are not writing the job description of a particular person who currently holds a position, but rather the job description of a theoretical person who may hold the position in the future. This approach helps to reduce unconscious bias in the drafting of job descriptions.

I would also encourage the FSA to consider including the line “any other duties assigned by the executive” to each job description in order to address any unforeseen gaps that may arise.

Recommendation 4: Revise FSA Representation on LAM.

I agree that union representatives must be selected by the union rather than management. In my experience, LAM issues can often spillover into individual (yet generalizable) grievance issues. One way to handle this issue is to designate the President and at least one other VP to attend along with the Chief Steward, depending on the agenda items.

Constitutional Changes

Recommendation 5: Change the FSA Constitution to increase FPSE representative terms to two-year terms.

I concur with this recommendation. Learning curves can be steep. My only suggestion is that two-year terms be phased in so that not everyone’s term expires at the exact same time. This helps with continuity.

Recommendation 6: Change the FSA Constitution and Bylaws to include a “resign-to-run” bylaw.

I’d recommend against this change. A vibrant union should have lots of contested elections and by-elections which should be seen as opportunities to involve and engage as many members as possible. Prior experience on the executive should be seen as an asset, not an “unfair advantage”, but either way, members should get the final say on who they want representing them. This is good for union democracy. Resign to run can serve to limit that democratic impulse and means the FSA may lose some of its best and brightest for a period of time.

Recommendation 7: Ensure that only constituents elect constituency-based representatives.

I strongly recommend against this change. While ensuring that each distinct constituency within the bargaining unit is represented is a good thing, limiting who can vote for them

can cause major problems. An executive member who was only elected by their own constituency is still responsible for making decisions that have an impact on the entire membership. In fact, I'd argue that at the level of the executive, MOST decisions that get made touch the entire membership in some way. Therefore, each member of the executive should be subject to an election open to the entire membership. Moreover, setting up a constituency-based model may deepen or exacerbate existing divisions with people filling those positions feeling they are only responsible to the small fraction of the membership that was eligible to vote for them. While a constituency-based model is sometimes used in composite locals (unions made up of different bargaining units at different worksites), it is not typical in most unions, especially those that operate with a single bargaining unit.

Recommendation 8: Discontinue the FSA's registration as a society.

I do not have enough information about this issue to offer an informed opinion either way.

Recommendation 9: Reinstate the JCAC Co-chair vote on the FSA executive.

I made comments earlier about the proposed FSA executive restructuring (see recommendation 1). The point I'd like to make here is that ALL members of the FSA executive should have voting rights. If a position is important enough to have on the executive, it is important enough to have voting rights.

Recommendation 10: Remove executive requirements to attend SACs.

This seems like a very sensible recommendation that would free up time for other important work. It sounds like these duties could easily be covered off by well-trained stewards.

Relationship Development

Recommendation 11: Develop a handbook (print and/or electronic) for all FSA members about how to identify workplace problems (both in health & safety and in workplace injustice).

I like this recommendation, but would encourage the FSA to not bite off more than it can chew or to reinvent the wheel. Many unions/labour organizations have produced such educational documents, especially around health and safety. These could easily be modified. More importantly, however, the FSA does not want to produce a document that may be viewed as being in competition with the collective agreement. An alternate approach might be to include or beef up the educational component to the FSA newsletter with different columns in each edition on "how to identify workplace problems."

Recommendation 12: The FSA President reach out to the UFV Student Union Society.

A hundred times, yes. FSA-student relationships are vital. In order to be effective, however, they need to be sustained, mutual, and entered into with eyes wide open in terms of the power imbalances. So, my recommendation is don't reach out until you have a plan in place for how to build a relationship that will move beyond a single meeting. FPSE and CAUT should have advice/resources on how to build strong links with student groups.

Recommendation 13: Develop a plan to support casual workers.

This is a very pressing issue that deserves the attention of all university workers. Again, don't reinvent the wheel in terms of advocacy. CAUT is doing some great work in this area. So make full use of the resources of larger labour umbrella groups and tailor them to your own university.

Collective Bargaining

Recommendation 14: All agreements made with the Employer between bargaining years are ratified by the whole FSA executive and, when required, by membership.

To think the FSA operates in a different way at present is cause for concern. Unless the FSA delegates its authority to a single person or position, this type of thing should never happen. Of course, the risk of delegating authority to a single position is that the burden of making the decision rests on a single set of shoulders. The recommendation, therefore, that all agreements made with the Employer between bargaining years be ratified by the whole FSA executive and, when required, by membership, is a very good one. It makes the decision more democratic and guarantees wider buy-in.

Recommendation 15: Incorporate the removal of Article 32: Agreement Committee from the Collective Agreement in the FSA bargaining plan for 2019.

I do not have enough information about this issue to offer an informed opinion either way.

Recommendation 16: Establish a bargaining plan that aligns with the FSA Strategic Plan.

This is an excellent idea that could potentially help transition the FSA away from kitchen sink collective bargaining (typical of faculty associations) and towards campaign-style collective bargaining, wherein the unions draws from its own strategic priorities, identifies areas of key leverage, and mobilizes members in unique and escalating ways in order to win demands. If done methodically and carefully with the backing of the membership, integrating the strategic plan with the FSA's bargaining mandate could help yield important gains in collective bargaining for members.

Data Collection and Records Management

Recommendation 17: The VP, Member Engagement develop consistent record-keeping methods to document FSA events.

This is a critical recommendation that should be adopted without delay. Clear, effective, and efficient record keeping will help the union better enforce the collective agreement through the grievance procedure.

Recommendation 18: FSA develop and maintain a comprehensive list of FSA members and their home departments.

This is another critical recommendation that should be adopted without delay. The union must have basic information about all of its members in order to: help inform the union's strategic priorities, assist in mapping the workplace, identify areas of weakness and strength, independently verify information provided by the Employer, and help with grievance work.

Recommendation 19: FSA track membership numbers on a monthly basis.

I concur with this recommendation. This is a good practice that can help the FSA identify trends and ensure dues remittance is being done properly.

Recommendation 20: Strengthen reporting requirements for FSA executive members.

I concur. If a position is important enough to have on the executive, it is important enough to produce a written report for each meeting. Written reports have the added benefit of helping to save time in meetings and of producing a written record of FSA activity and accomplishments.

Recommendation 21: Request an annual summary of FSA interactions with FPSE.

I concur. This document could be pieced together using the written reports recommended as part of recommendation 20.

Recommendation 22: Conduct an FSA policy audit.

I concur. Over time, unions can sometimes adopt, amend, misplace or simply forget about policies it has adopted. This is why an audit is a good idea. Hopefully, such an exercise will result in a way of tracking and compiling policies, updating those that need updating, and educating Executive members and the membership more broadly on the content of FSA policies.