

## Local Officer Handbook



September 2023

## Preface

Welcome to your Local Executive Board! By accepting your position you've joined the team that will be leading your Local. This role is extremely important; strong leadership can have a tremendous effect on the health of the Union and on the participation of members in enforcing good working conditions.

This short Handbook is designed to introduce you to the roles and responsibilities of the various positions in our Union, including your Local Shop Stewards, the members of your executive board, and the paid staff and elected leaders of both the National Union you belong to (the Public Service Alliance of Canada) and the Component (Yukon Employees' Union). You will also find tips and advice on the practical matters of leading your Local, such as running successful meetings and managing your finances.

A Resource section at the end of this guide has samples and blank forms for most of the activities you'll be involved in.

Thank you for taking on this role.

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## Introduction

Unions have a long history of improving the lives of working people and winning a lot of the benefits that we now take for granted (such as the [eight-hour working day](#), and [paid maternity and parental leave](#)). The ability to make those changes came from organized, collective action, but that sort of organization does not simply happen all on its own; it requires intentional planning from dedicated leaders. That's where you come in. The purpose of this Handbook is to give you a head start in thinking about what your Local is and why it is important in the first place, how your Local fits in with the bigger Union you are a part of, and how to go about the day-to-day business of keeping the Local healthy.

The Handbook begins with a section on the importance of unions in general. As you get involved with the details of leading your Local through its daily business it can be easy to lose sight of the bigger picture; this section is meant to remind you of that bigger picture and of the importance of your Union activities. Next there is a section on the internal organization and governance of PSAC. Your Local has significant independence when it comes to your relations with your employer, but you are connected to a much larger organization and it is important to understand those relations. Many problems come from misplaced expectations and a poor understanding of who is supposed to be doing what, and so we've included a section on the division of labour within the Union. The main section discusses the many aspects of leading a Local, from mapping out who your members are, to devising some strategies for continued communication with them, to holding regular meetings of the executive and annual meetings of the entire Local. The Handbook closes with some advice from experienced leaders in roles similar to yours and a collection of resources that should make some of your tasks more efficient.

Although there are different offices in the Local Executive, all officers are part of the team leading the Local. Most of this Handbook is addressed to the executive team as a whole, but the particular responsibilities for each position are outlined in your bylaws.

## **Why Union?**

### **A. Introduction**

Participating in the leadership of your Local can be demanding and difficult. As with many other activities, it can be all the more difficult if you don't have a clear idea of why you are doing this or how it makes a difference worth caring about. This section will explain some of the reasons why your Union is worth the energy you'll be asked to put into it. Unions are a force for good in the lives of very many people: they put some of the control over working conditions into the hands of the people most affected by them, they bring many benefits leading to better overall quality of life for you and your co-workers, and they counter some of the trends in our society making the rich even richer and the poor even poorer.

### **B. Balance of Power and the Negotiation of Working Conditions**

As part of the labour force, your job is incredibly important to you. Unless you are fortunate enough to have other sources of income, the money you get from working is the only way you can reliably secure food, clothing and shelter for yourself and your family, and the main resource you have to pay for vacations, enjoy the finer products our society produces, and help out others in need. Furthermore, for most of us our job is not merely a source of income but is also a major way that we contribute to the functioning of society. The sense of productivity and fulfilment from a job well done is an essential part of living a good life. It isn't a stretch to say that your overall well-being in life is tied very closely to the conditions of your employment; if you can't enjoy your time at work because those conditions are poor (you are not adequately compensated, you don't get enough leave to strike a healthy work/life balance, you come away from work feeling overly stressed, anxious or disrespected) then it can be very difficult to fully enjoy your time away from work either. It is because your working conditions have such a powerful effect on your overall well-being that it is good for you to have some control over them.

Putting some control over working conditions into the hands of the labour force is the primary reason for the existence of labour unions. In an employment environment with no union, control over working conditions lies almost entirely in the hands of the Employer and its management staff. The Employer determines how they will pay each employee, what benefits they will offer, and who they will 'let go' when they decide that they need to downsize. Of course, this doesn't mean that they can set just any conditions they please. Employers are still restrained by legislation (including Employment Standards, Human Rights and Occupational Health and Safety) and by economic forces (e.g. competition with other employers for good employees forces an employer to offer attractive compensation). It does mean, however, that most employees are limited to either accepting the conditions offered by an employer, or looking for work elsewhere. Employers can retain this control because of an imbalance of power; in most cases any individual employee is relatively easy to replace, and this means that, in most cases, an employee needs their job more than their employer needs them.

Along with this imbalance of power is a conflict of interests. You and your employer want many of the same things; you both want the operation to be successful (ensuring profitability and continued work in the future), you both want to produce valuable goods or services that enhance our society, and you both want to avoid workplace injuries and accidents. At the same time, you have different priorities and a set of interests that are in conflict. Employees have an interest in being paid more while your employer has an interest in paying you less. Safe working conditions are much more important to employees than is the overall profit margin; but for employers the costs of better safety measures can be a heavier deterrent to putting those measures in place. Employees have strong interest in steady, secure, full-time employment while employers often prefer the ability to fluctuate the amount of work as the operation demands. When it comes to the major things one wants out of the employment relation, employees often find that they have more interests in common with their fellow co-workers than they do with their employer.

In its simplest form, a labour union is nothing more than a number of employees recognizing common ground and deciding to negotiate working conditions with their employer *collectively* instead of *individually*. This decision corrects the imbalance of power between employer and employees because it is much more difficult and costly to replace an entire workforce (or a sizable portion of it) than it is to replace any individual employee. Refusing to negotiate working conditions with a single employee might result in that one employee refusing to work, in which case he/she can be replaced with relatively minimal costs to retrain someone else and minimal loss in overall productivity. However, refusing to negotiate working conditions with group of employees acting collectively might result in that entire group refusing to work at the same time. That group can be very difficult to replace, cost a lot of resources to train the replacements, and can result in a shut-down of the whole operation with massive loss of productivity.

These principles are easiest to grasp by thinking of an industrial, private-sector operation but they apply just as well to any other employment relation. Most of the Locals with Yukon Employees' Union exist in the public sector (territorial or municipal government workers) or the non-profit sector where "maximizing profits" isn't on anyone's radar. These operations are still managed within a budget that demands efficiency, however, and that demand can result in the same power dynamics and conflicts of interest between employees and management. Unions exist to promote and protect the collective interests of employees in any sort of work environment, and to put some control over working conditions into their own hands.

### **C. Benefits of Unionization**

Being an active member of a union comes with many benefits, some more obvious than others. Less-obvious benefits include membership in a community with shared interests and being empowered to make positive changes in your workplace. More obvious benefits include:

- a. Better pay and benefits. According to the [Canadian Labour Congress](#), unionized workers in the Yukon earn, on average, \$6.65/hour more than Yukoners without a union. In 2014, this added up to nearly \$100 Million extra dollars in the



pockets of unionized Yukoners. Female Yukoners earn an average of \$7.45/hour more if they are unionized, and unionized workers under the age of 25 earn 27% more than their non-unionized peers. In addition to better wages, unions consistently set higher standards for paid leave, extended health, dental and disability coverage, and pensions or RRSP contributions.

- b. Job Security. Without a union, Employment Standards legislation gives you the right to a minimal period of notice before being laid off and in certain circumstances of termination you can hire a lawyer to present a wrongful dismissal case. In contrast, unionized workers often have seniority provisions granting more protection from layoff as you accumulate years of service, and employees can only be terminated for “just cause”, meaning that the reasons for termination must meet a standard of reasonableness that is reviewable by a third-party arbitrator. These enhanced job security measures allow employees more confidence and less stress and anxiety in planning for the future.
- c. Equality and Inclusion. Unions are often criticized for demanding that pay scales and benefits be applied to each employee equally, rather than being used as incentives to work harder or as rewards based on merit. The charge is that demanding equal treatment removes (healthy?) competition among co-workers and eliminates the motivation to improve or work any harder than necessary. There is some truth to this. The missing part of the story, however, is that difference in treatment is rarely based on pure merit anyway. In a non-unionized workforce you get favorable treatment by being on the manager’s good side. Working harder than your peers might get you onto that good side, but there are other, much more arbitrary ways to accomplish that goal as well. Likewise, there are ways to get on a manager’s bad side that have nothing to do with merit (such as talking to a union organizer). Additionally, it is a mistake to assume that employees naturally want to be as least productive as possible (so

that they will do poor work when you lose the ability to add extra rewards based on merit). There are incentives to perform good work that are independent of your paycheck.

The cost of equal employee treatment (as opposed to competition among employees) is questionable, but the benefits are tremendous. Unions are a major force for inclusive work practices: for bringing more females into the workforce and paying them at the same rate as their male peers, for pressuring employers to remove unnecessary barriers that prevent some persons with disabilities from fully participating in the workforce, and for ensuring that one's race, religion, sexual orientation, etc. do not affect one's "merit" bonuses.

#### **D. Effects of Declining Unionization**

The [Introduction to the Government of Canada's 2016 Budget](#) paints a pretty grim picture of the financial situation of average Canadians. According to its data,

Over the past 30 years, the median wage income has barely risen [but] ... The cost of living for some Canadian families has continued to rise. This is true for things needed today—like healthy food and child care—as well as for post-secondary tuition, something that Canadians rely on for upward mobility.

Over the same 30 year period,

among the wealthiest 0.01 per cent of Canadians, after-tax after-transfer incomes have risen dramatically ... Individuals earning more than \$1.8 million per year have, on average, seen their incomes rise by nearly 156 per cent in that time (or 3.1 per cent per year on average) after taking inflation into account.<sup>1</sup>

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<sup>1</sup> <http://www.budget.gc.ca/2016/docs/plan/introduction-en.html>

This economic data from the past 30 years can be explained in various ways but one feature that shouldn't be overlooked is that it coincides with a decline in union density (how much of the workforce belongs to a union) and overall union strength.<sup>2</sup> This is intuitive: unionization is a force for improving the prosperity of the working class and as unions gain influence they shift wealth away from the very rich. In fact, unions don't just improve those members of the middle class who happen to belong to a union; they improve the bottom line for everybody, unionized or not.<sup>3</sup>

This should matter to you as a Local Executive Officer because the work you do for your own co-workers in your own corner of the Yukon Territory actually supports a much bigger labour movement in Canada. It is one small piece of the effort, but the project is worth putting energy towards. You are a force for a more equitable distribution of wealth. The benefits that you and your Local win at the bargaining table contribute toward the improvement of conditions for all working people in Canada.

## **E. Conclusion**

Much more could be said in support of unionization but perhaps this is enough to get you thinking about why you would want to spend your time and energy serving as a Local leader. You'll be in a position to make a big difference in the lives of your fellow co-workers, and you'll also be part of a bigger movement concerned with promoting equality and fairness.

More on this:

- Heron, Craig. *The Canadian Labour Movement: a short history*. Toronto: Lorimer, 236p.
- Behrens, Matthew (ed.). *Unions Matter*. Toronto: Between the Lines. 216p.
- Yates, Michael D. *Why Unions Matter* 2<sup>nd</sup> ed. New York: Monthly Review Press. 200p.
- Canadian Centre for Policy Alternatives: <https://www.policyalternatives.ca/>

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<sup>2</sup> For more info: <https://www.policyalternatives.ca/union-card>

<sup>3</sup> <https://www.theatlantic.com/business/archive/2016/08/union-inequality-wages/497954/>

## Union Organization and Governance

### **A. Introduction**

We stated above that in its simplest form, a labour union is just workers recognizing common ground and deciding to negotiate working conditions with their employer collectively instead of individually. That simple form is useful for thinking about the reason that unions exist, but in the real world, things are always more complicated. Unions are regulated by labour legislation, so gaining the right to collectively bargain with your employer is more complicated than just banding together in the workplace and deciding to do so. Furthermore, in order to effectively operate, a Union needs a lot of members contributing toward the costs of administration, legal representation, and maintaining a fund to pay workers when they do need to strike. When they grow to that size, there is a need for a lot of internal organization and governance. This chapter will briefly explain the structure of our Union, in order to help you better understand where you fit as a Local executive officer.

### **B. Legal Framework**

In order to gain the right to bargain on behalf of a group of employees a Union has to be certified under a labour relations board. The group of employees is known as a “Bargaining Unit” and the Union certified to bargain on their behalf is the “Bargaining Agent”. Note that a Bargaining Unit doesn’t need to include all the employees of a particular operation; it might just be the employees working in one department or sector. For example, there are two bargaining units for the employees of the City of Whitehorse: one comprising only Transit workers and another comprising the employees in all other departments. Becoming certified as a Bargaining Agent requires a successful application with the governing Labour Relations Board. The Canadian provinces have their own Boards but the Yukon is governed by federal legislation. *Unless you are employed by the Yukon Government*, the Union is certified to represent your Bargaining Unit under the [Canadian Industrial Relations Board](#), regulated by Part 1 of the [Canada Labour Code](#).

The public service has its own set of regulations. Our union is certified as the Bargaining Agent for six separate Bargaining Units within the Yukon Government: one for each of the Watson

Lake, Dawson City, Mayo, and Old Crow communities, one for Whitehorse employees in Health and Social Services, and one for Whitehorse employees in departments other than HSS. Teachers in the department of Education form a seventh Bargaining Unit, but they are represented by a different Union, the [Yukon Association of Education Professionals](#). Labour relations involving the public service are regulated by the [Yukon Public Service Labour Relations Act](#) and certification as the Bargaining Agent is authorized by the Public Service Labour Relations Board.

In most jurisdictions in Canada (including the Yukon) a Union can become certified to represent a Bargaining Unit when it collects signed membership application cards from at least 50% of the members of that Unit. Likewise, a Union's certification to represent a Bargaining Unit can be revoked when at least 50% of the members apply to decertify. When it becomes certified as a Bargaining Agent, a Union gains the *exclusive* right to bargain with the Employer on behalf of the Bargaining Unit. This means that no other Union or association can enter into legitimate agreements with the Employer relating to those working conditions. Along with exclusive bargaining rights, the Union takes on a [duty of fair representation](#), meaning that it is obligated to represent each member of the Bargaining Unit without arbitrary, discriminatory, or bad faith conduct. Complaints by members of the Bargaining Unit against its Bargaining Agent can be made to the certifying Board, and that Board has the authority to order a remedy when it finds that the complaint has merit.

As a Local Executive Officer, you are part of the team leading your own Bargaining Unit. Your Unit forms one 'Local' of the [Public Service Alliance of Canada \(PSAC\)](#). PSAC is the official Bargaining Agent certified to represent you in bargaining with your Employer, but it should not be thought of as some third organization in between your Bargaining Unit and your Employer. Rather, you and your co-workers are *members* of PSAC. The larger organization supports you in numerous ways but you still play the main role in keeping your members organized, setting bargaining proposals, engaging in negotiations with your Employer, and enforcing the Collective Agreement.

### **C. Democracy in Union Organization**

Unions are built around the recognition of collective strength, and they derive the authority they have from their membership. At every level of organization there is a democratic process establishing budgets and bylaws and placing members into leadership positions. Just as you were elected by your co-workers into a leadership position in your Local, Locals select delegates to participate in the governance of Yukon Employees Union, the North Region of PSAC, and PSAC National. Those delegates vote on all matters of importance (including the budget and the governing bylaws) and elect their own leaders at each level of organization. Ideally, a Local will get a strong majority of its membership to participate in the election of officers and setting goals, but even when this sort of participation is hard to come by you have a duty to preserve the democratic process. Individuals are not appointed to union positions without the support of the membership and executive members do not make decisions that lie outside of their mandate. Keep in mind that as a Local executive officer you are ultimately answerable to your membership; the decisions you make should be transparent and within the mandate they elected you to advance. The same goes for the leaders at every other level of the organization.

### **D. Levels of Organization and Governing Documents**

#### *i. PSAC*

The Public Service Alliance of Canada began in 1966, when two former civil service unions decided to merge. Today, it includes over 180,000 members throughout Canada. Most of these members work for the Federal government in areas such as the Treasury Board, Taxation, and Border Services, or for the one of the three Territorial governments. The Union has its headquarters in Ottawa and it is divided into 7 regions. We are a part of the North Region, with headquarters in Yellowknife. In addition to being divided into 7 geographic regions, PSAC is divided into 13 Components. Our Component is the Yukon Employees' Union with headquarters in Whitehorse. Our Component happens to operate only in the North Region, but other Components have a presence in more than one Region. For example, the Canada Employment and Immigration Union (CEIU) has regional offices throughout Canada.

The main governing body of PSAC is its Triennial Convention. This is a gathering of delegates from each Local (selected by the Local) at the National headquarters every three years. Convention delegates propose, debate, and approve Resolutions setting the mandate for the Union. They approve a budget, make amendments to the Constitution, and elect the National leaders. In between Conventions, the Union is governed by the National Board of Directors (NBoD), composed of the National leaders, the Presidents of each of the seven Regions, and the Presidents of each of the thirteen Components. They make decisions in accordance with the [Constitution](#) approved by Convention.

[PSAC North](#) is one of the seven Regions of PSAC, and it has a similar governance structure. It has its own Triennial Convention at which its Regional Executive Vice President is elected. PSAC North has a Regional Office located on the main floor of the Union Hall shared with YEU in Whitehorse. It is staffed by Regional Representatives who offer union training open to all members and support with all aspects of bargaining. Keep an eye on their [Course Listings](#) page for training courses for Local Officers.

*ii. Yukon Employees' Union – the Component*

Yukon Employees' Union began in 1965 as the Yukon Territorial Public Service Association representing employees of the Yukon Government. At that time, it was a Local under PSAC. It was renamed the Yukon Government Employees' Union in 1983 and then acquired its current name and standing as a PSAC Component with its first Triennial Convention in 1990. As of 2018, YEU includes 24 Locals throughout the territory, including employees of municipal governments, the Yukon College, the hospitals, and several non-profit societies. A full list of YEU Locals can be found on our website at: <http://www.yeu.ca/Locals>. YEU represents over 5500 members, which is over 20% of the working population of the Yukon.

As a Component of PSAC, YEU is subject to the PSAC Constitution. At the same time, YEU holds its own Triennial Convention, attended by delegates from its Locals. Those delegates represent the interests of their Local in setting the mandate of the Component. They elect leaders who

direct the Component in between Conventions. YEU also has its own budget and [bylaws](#), both approved by the Convention. YEU hires full time staff to manage finances and communications, provide training and support to union members, and assist Locals with member representation.

### *iii. Your Local*

If PSAC is compared to a living organism, its Components (including YEU) might be thought of as distinct organs. Those organs, in turn, are made up of cells and although the cell has its own parts, it is recognized as the primary unit of organization. In union structure, a Local can be compared to an individual cell. Locals are made up of different members performing various functions, but they are the primary unit of organization in the entire structure. Although each Local in PSAC is connected to the others in various ways, they remain relatively independent when it comes to their dealings with their Employer. With practical assistance and support from PSAC and YEU staff, each Local bargains its own Collective Agreement, elects its own network of Shop Stewards to 'police' the agreement, and elects its own leadership to keep the Local organized.

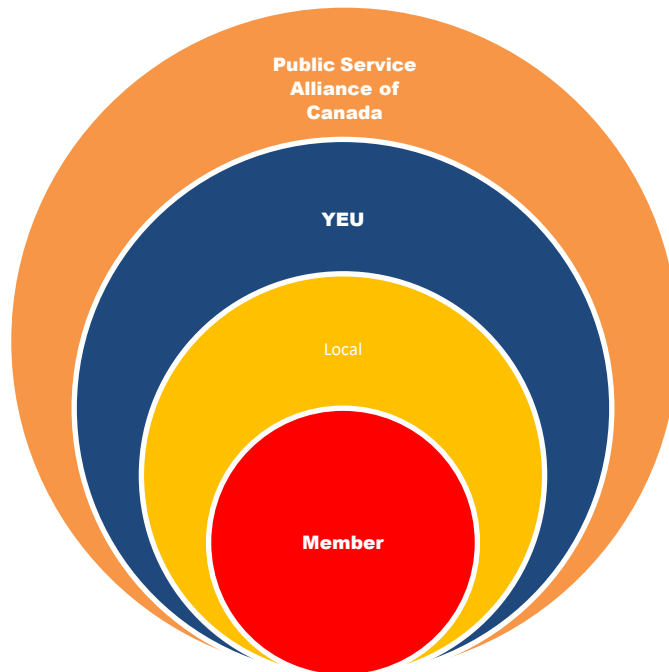
As a Local under the YEU umbrella, which is itself under the PSAC umbrella, you are subject to both the YEU bylaws and the PSAC Constitution. Within that scope, however, your Local has its own set of bylaws and is governed by its own Annual General Meeting, where goals and priorities for the future are set, leaders (like yourself) are elected, and a budget is approved. As a Local Officer you'll want to be aware of the governing documents of YEU and PSAC, and especially your own bylaws. Always keep in mind that as an elected officer of your Local your mandate is to advance the interests of the folks you represent. They have entrusted you to make decisions within the directions set at the AGM. Bylaws for most of our Locals are hosted on YEU's website at <http://www.yeu.ca/Locals> and should be included with the materials you inherited when you accepted your position.



A few things to pay special attention to in your bylaws:

- Your Local bylaws make reference to the bylaws and constitution of YEU and PSAC. This means that while your Local bylaws are the primary set of rules for you to follow, you are also held to the governing documents of the Component and the broader Union. YEU's bylaws are available online at <https://www.yeu.ca/Locals>, and PSAC's constitution and regulations can be found at: <http://psacunion.ca/psac-constitution-and-regulations>.
- Your bylaws will list the positions on your executive board, the term of office and the basic duties. There will also be regulations for electing members to those positions and for removing them from office.
- Become familiar with the regulations for holding an Annual General Meeting and for managing the Local's finances.
- A Discipline section will list offenses (such as crossing a legal picket line or working in the interests of a rival organization) and the penalty for committing them
- There is a process for amending the bylaws, so long as they remain consistent with those of YEU and PSAC.

Keep in mind that the tips and suggestions written in this handbook are guidelines only, and that your Local bylaws provide your governing regulations.



### **E. Financing the Union**

Organizing PSAC's 180,000 members (and keeping them organized!) is a monumental administrative task requiring a lot of resources. In addition to its administration costs, the Union pays for training members, Shop Stewards and Local officers, the negotiation and mediation expenses of bargaining good collective agreements, the legal expenses of bringing grievances to arbitration, and the maintenance of a strike fund to pay members when they do need to strike. Dues are collected automatically off of the paycheck of every member of a PSAC Bargaining Unit and sent to the national office of PSAC. A budget (including the dues structure) is approved by members at every Triennial Convention. A portion of those dues is remitted to the Components (including YEU), and used for their staffing and program expenses. Another portion is remitted to Locals, providing the operating budget that you will have to work with. The members at both the Convention and Local levels have the ability to approve increases to the dues their members pay when a financial need justifies it. The process for this will be explained in "Managing Local Finances" on p.39.

Every member of a Bargaining Unit contributes to the costs of operating the union by paying dues, but signing a membership card is what makes you a 'Member in Good Standing' and gives you the ability to vote in union elections and run for union offices. Members who have not signed a card are known as "Rands".<sup>4</sup> While Rands benefit from the activities of the union, they don't get a vote in setting the union's direction. An exception to union dues exists for members of a religious community whose doctrines forbid union membership, but even in this case an amount equivalent to union dues is deducted from the member's pay and contributed toward a charity.

## **F. Conclusion**

The affairs of your own Local are your main area of concern as a Local Executive, but it is important to remember that your Local exists as one part of a much larger organization. Representatives from your Local will serve as delegates to the governing Conventions of YEU and PSAC, and the decisions made at those Conventions (particularly amendments to the Constitution or Bylaws) affect the decisions that can be made at the Local level. Spend some time becoming familiar with your Local's own bylaws, but remember that you are also governed by YEU's bylaws and PSAC's Constitution and Regulations. Strong leaders at the Local level keep in touch with events happening at the Regional, National, and Component levels, and exercise their right to be represented at them.

### **MORE ON THIS:**

- PSAC. *Local Officers' Handbook*. Available from your PSAC Regional Representative during a Local Officer's Training course.
- PSAC's Constitution and Regulations. Available online at: <http://psacunion.ca/psac-constitution-and-regulations>
- YEU's Bylaws. Available online at: <https://yeu.ca/about-us/yeu-bylaws/>

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<sup>4</sup> After Justice Ivan Rand, who in 1946 settled an arbitration dispute by ruling that all bargaining unit employees would have dues 'checked off' of their pay regardless of whether they chose to become active members of the union representing them. For more on the "Rand Formula" see <http://psac-ncr.com/union-dues-rand-formula>.

- Your Local's Bylaws. Some are available online at: <https://yeu.ca/Locals/>. If yours is not available there, contact us at 667-2331
- PSAC North: <http://psacnorth.com/>

### Division of Labour: Roles and Responsibilities

The work of the union is divided up between various roles and positions, some within your Local and some outside of it. You'll need a good understanding of your own role but you'll also need to understand how the other pieces fit together. The following snapshot should help:

- I. OUR UNION: PUBLIC SERVICE ALLIANCE of CANADA (PSAC)
  - a. National Board of Directors – Composed of the National President, the National Executive Vice-President, the seven Regional Executive Vice-Presidents and the 13 Component Presidents, this board is charged with ensuring that the activities of the union fall within the mandate and directions established at Triennial Convention.
  - b. Alliance Executive Committee – Composed of the National President, the National Executive Vice-President, the seven Regional Executive Vice-Presidents, the [AEC](#) is responsible for the day-to-day management of the union.
  - c. Regional Executive Vice President (North) – This is the main leader in charge of representing the concerns of PSAC members in the North region. They are elected at Triennial Convention, which occurs the Spring before the YEU convention.
  - d. Regional Committees: In each of the territories there are [committees](#) made up of PSAC members for the following concerns:

- i. Indigenous Peoples
- ii. Access for Persons with Disabilities
- iii. Pride
- iv. Women
- v. Racially Visible Persons
- vi. Health & Safety
- vii. Youth
- viii. Regional Alliance Facilitators Network

Membership is open to all who self-identify as belonging to one of the equity groups. Information about these committees is available from the Regional Office in Whitehorse.

- e. Regional Representative – PSAC regional reps assist YEU Locals by offering training and support for rank and file members, Shop Stewards, and executive officers.
- f. Regional Negotiator – A negotiator from PSAC will work with your bargaining team when it comes time to renew your contract.

## II. OUR COMPONENT: YUKON EMPLOYEES' UNION (YEU)

- a. Elected Leadership – YEU has an [executive board](#) similar to those in the Locals, with positions elected at Triennial Convention, and with a similar set of roles and duties. Three positions (President, Vice-President, and Vice-President for Communities) are full time paid positions. The YEU leadership duties and authority are specified in the YEU Bylaws. Overall it:

- i. Oversees all the operations of the Component, ensuring they follow the directives approved at Convention.
  - ii. Guides and supports Locals when they initially form, when they enter bargaining, and when they are contemplating job action.
  - iii. Assists Locals in organizing and staying organized; acts as trustee of Locals that dissolve or are suspended.
  - iv. Engages with the community through media relations and support of various community events.
- b. Executive Director – The ED manages the YEU staff and all of the day-to-day operations.
- c. Administration / Membership Services – Maintains a database of YEU members, registers members for events, supports the rest of the YEU staff.
- d. Financial Officer – In addition to managing YEU’s budget, the financial officer will periodically cut your Local a check for dues remission. If your Treasurer hasn’t registered a current mailing address for these checks, they may need to be picked up at the Hall. The financial officer will also process reimbursement (including loss of salary and per diem expenses) when members attend approved union events.
- e. YEU Communications Team – In addition to publishing and maintaining our website, blogs and newsletters and press releases, YEU’s communications team can assist your Local in various ways, including:
  - i. Advertising your AGM or other Local events in our internal communications.
  - ii. Providing support to create a Local webpage or social media group.
  - iii. Creating posters to help communicate issues to your members.
  - iv. Publishing articles or updates about Local issues in our newsletter.

- f. Intake Officer – Shop Stewards contact the Intake Officer when a member they are working with needs to file a grievance or needs assistance from an Advisor. Members call Intake when a Shop Steward is unavailable. As an executive member, you will contact Intake if you act as a Shop Steward, assisting a member with workplace issues. The Intake Officer tracks cases, maintains records of member representation, and directs members or stewards to their Labour Relations Advisor when appropriate.
- g. Education Officer – The Education Officer matches the YEU’s educational needs with appropriate courses. Some courses are developed and delivered by the Education Officer while others are available through the PSAC or other labour organizations. As new Local Officers, you can get trained in the basic functions by taking a PSAC Local Officer Training course. As you recruit new Shop Stewards, they will need to be trained in basic Shop Stewarding and supported with on-going training is provided at the union hall in Whitehorse.
- h. Labour Relations Team– LRAs support Shop Stewards at early stages of member representation and provide advanced representation at later stages and with complex issues. Cases are typically assessed by a Shop Steward and tracked through Intake before a LRA becomes involved, but LRAs are available for advice and support throughout the process.

### **III. YOUR LOCAL**

- a. Rank and File Members – Many employees in a unionized environment know very little about what the Union does and how it functions, taking for granted all the protections and benefits afforded to them in the collective agreement. The truth, however, is that each member bears some responsibility for the functioning of the Union. Members are responsible for participating, and can do so in a number of ways:

- i. Sign a membership card and keep their personal contact information current by regularly updating this on our website [yeu.ca/update](http://yeu.ca/update). All employees in a unionized workplace pay union dues, but they aren't listed as a member-in-good-standing (MIG) until they voluntarily sign a card. Contact information is kept confidential and is used only to communicate Union business such as invitations to meetings.
  - ii. Read the collective agreement. Always refer members to their collective agreement when answering questions and look it up together.
  - iii. Talk to a Shop Steward and file a grievance when the collective agreement is not being followed. Some members prefer not to 'rock the boat' and would rather put up with less than what the Union has bargained for them. They need to understand that setting this precedent can hurt their co-workers.
  - iv. Attend the AGM and any special membership meetings that the Local calls. Encourage members to give input to proposals and items for discussion.
  - v. Submit bargaining proposals when it comes time to negotiate a new agreement. Attend a ratification meeting once the bargaining team is ready to recommend an agreement, and vote on its acceptance or rejection.
  - vi. Join a committee on an issue of interest (e.g. health and safety, indigenous rights, access for persons with a disability)
  - vii. Volunteer at Local-sponsored community events such as YEU's annual 'Feed the People' barbeque
- b. Shop Stewards – Shop Stewards are volunteer Union representatives in a workplace, elected as-needed by the members they represent (usually from a single unit or workplace). Your bylaws will contain a section outlining Shop



Steward elections, terms of office, and duties. Shop Stewards “police” the collective agreement by:

- i. Understanding the collective agreement and being available to explain it to others.
- ii. Monitoring workplace customs, policies, and directives to ensure that they are in line with the agreement.
- iii. Assisting members through the first stages of the complaint/grievance procedure when it appears that the agreement is not being followed properly.
- iv. Representing members under investigation for possible discipline and reporting back to Union staff.

Importantly, Local executive members can also act as Shop Stewards by representing members in their Local. If this is something you are interested in doing, you have access to all the same training and resources that other Shop Stewards have, including an initial orientation session covering the basics of representation, monthly round-table discussions, annual conferences, and a host of printed and online material. Find more information at

<https://www.yeu.ca/stewards>

- c. Convention Delegates – Each Local sends delegates to the Triennial Conventions for YEU, PSAC North, and PSAC National. Delegates are elected by the membership and the number of delegates you can send depends on the number of members in your Local. Delegates:
  - i. Represent the interests of the Local when voting on matters that set the direction for YEU and PSAC.
  - ii. Submit resolutions to Convention committees which, if approved, will be voted on by the general Convention

- iii. Report back to the Local on their experience and on the decisions adopted.
- d. Committee Members – Your Local might establish committees in charge of various areas of concern, such as member engagement or community outreach. Committee members make action plans and decisions within that area of concern and make recommendations to the executive members.
- e. Bargaining Team – A bargaining team is formed several months before your collective agreement is due to expire. Regulations about how many members are on the team and which executive members are involved can be found in the YEU bylaws and your Local bylaws. The bargaining team will:
  - i. Solicit bargaining proposals from all members.
  - ii. Work with a PSAC negotiator to prioritize proposals and plan negotiations.
  - iii. Report bargaining updates to the executive board and to the rest of the membership.
  - iv. Recommend the ratification of an agreement once satisfied with the results of bargaining, or inform the executive board of an impasse when a satisfactory agreement cannot be reached.
- f. Local Executives – The Local Executives are responsible for such things as:
  - i. Managing the affairs of the Local – this involves keeping in touch with the membership, ensuring that the decisions from the most recent AGM are being followed, and recruiting support (Shop Stewards, committee members, etc.) where needed.
  - ii. Attending, or appointing a delegate to attend, Joint Labour Management (JLM) meetings with management representatives in order to review current operations, express concerns about policies or procedures, and

- occasionally draft Letters of Agreement or Memorandums of Understanding to formally clarify the application of an item in the Agreement or make amendments in between bargaining rounds.
- iii. Addressing disciplinary issues, for example when a Local officer stops attending meetings.
  - iv. Ensuring that new employees get a Union orientation and an opportunity to sign a membership card.
  - v. Overseeing all issues of concern to the entire Local, including the work of the bargaining team and new decisions or policies from management.

The roles and responsibilities of each executive position is described in your Local's bylaws. Become familiar with this section of the by-laws and also how your Local has worked in the past. Talk to members of previous executives and get to know some of the challenges and ask for tips.

It is important to realize that each Local is a relatively self-contained unit. You have support from YEU and PSAC in the form of training and access to experts in advanced representation and negotiations, but most of a Local's affairs are managed within the Local by volunteers like you.

Hopefully this snapshot of the various roles in our union helps to set expectations and explain how tasks are divided. In general, members organize themselves by electing a leadership team, setting bargaining priorities, and enforcing the collective agreement through the initial stages of the grievance process. These activities must be consistent with the larger organizations they are a part of (the Component and the PSAC). Locals are supported by YEU/PSAC staff with training, administrative and communication support, advanced representation and negotiations.

## **Leading the Local**

### **A. Introduction**

As an executive officer in your Local you share oversight of all the Local's activities. This can be a daunting task, especially in a large Local with groups of workers that rarely interact with each other. This section will introduce you to some of the main areas of concern and offer some tips on managing them effectively. You'll be reminded throughout that delegation is key; Unions are meant to include a lot of people contributing a little bit each, rather than having any one member or any one small group of members trying to carry the entire burden themselves.

### **B. Mapping your Local**

#### *i. Membership*

One of the first things to do as a Local leader is to get familiar with your membership. At each workplace there is a division between the management staff and the Bargaining Unit. In smaller operations the management might consist of a single 'boss' or manager, but more often there is a hierarchy of Executive Directors, Divisional Directors, Managers, Human Resource Consultants, and sometimes Supervisors,<sup>5</sup> all of whom represent the employer's interests in the workplace (i.e. they are in charge of hiring and firing, directing staff to perform various tasks, disciplining employees, etc.). These positions are not a part of the Union – they are not covered by a collective agreement, they do not pay Union dues, and they do not participate in Union activities. The Bargaining Unit usually consists of all non-management employees in the workplace, but it might be restricted to workers in a single department or with a particular function (for example, Yukon Government employees in the Department of Health and Social Services form their own Bargaining Unit). Often your Collective Agreement includes a wage grid or list of job titles; those positions are all in the Bargaining Unit and that list is usually the best source of information about the boundaries of your Bargaining Unit.

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<sup>5</sup> In larger operations the first-level supervisors are often Bargaining Unit members. Usually, anyone with the authority to hire, fire, or discipline employees is outside the union.

As a Local leader you want to be as familiar as you can get with those included in your Local. Where do they work, what kind of work do they do, and what units or groups are they already organized into? In a smaller Local it is worth your time to make up a chart listing every member according to shift or work unit. In a larger Local you may not be able to list every member but you can list departments, branches, crews, etc. and note how many members are in each one. You were elected into your position by the group of members who showed up to your AGM, but you are responsible for leading the entire Bargaining Unit, and that likely includes very many more members than the ones who showed up. You'll need to know who they are before you can think about how your work can promote their interests.

## *ii. Collective Agreement*

A Local leader also needs to be familiar with the Collective Agreement (CA). Your CA is a legally binding contract between your employer and your Bargaining Unit, and can include anything from standards of pay and benefits, to regulations around health and safety, to seniority provisions. It gets renegotiated every few years (typically every 2-4 years) by a bargaining team put together from members of your Local. You can learn a lot about the struggles your Local has already been through by comparing your current CA against past Agreements. You can also learn a lot about current concerns by having discussions about what parts of the CA are working well and what parts the Bargaining Unit would like to amend.

There are a few articles included in all Collective Agreements that you should pay particular attention to:

### *a. Union Rights / Time off for Representatives*

The Union has the right to appoint its own representatives from among the employees in the Bargaining Unit, and those representatives are entitled to time off of work for various Union activities. In most cases, representatives can attend meetings called by the Employer or investigate urgent grievances on work time, with the permission of their immediate supervisor. Representatives also get leave to attend union training events. As a member of the executive

team you may also act as a representative and you should understand your rights to conduct union business.

#### b. Grievance Procedure

A grievance is a formal complaint about some action or decision by management, usually with regards to some particular article of your CA. All CA's include details on the grievance procedure. There are deadlines involved for filing a grievance after becoming aware of the issue, as well as deadlines for each step of the process. Shop Stewards typically lead most grievances through the initial steps of the procedure, and they are also trained to resolve workplace conflicts informally when a grievance can be avoided. At a minimum you should familiarize yourself with the basics of the grievance process, but if you are interested in representing members you should contact YEU to register for some Shop Steward training, and review the YEU Shop Steward Handbook.

#### c. Letters of Understanding

From time to time the Union and your Employer agree to special conditions not covered elsewhere in the Collective Agreement. These can become Letters of Understanding (LOU's) and are appended to the back of your CA. They are enforced the same way as other articles in the main sections of your CA. It is important to know about their contents when discussing working conditions with your members.

#### *iii. Shop Steward Network*

Shop Stewards are fellow Bargaining Unit members who have been elected by their immediate co-workers as representatives. Stewards function as workplace problem-solvers (resolving issues informally where possible, or through the first steps of the grievance process when required) and, to a certain degree, as workplace organizers, keeping Union members informed about Union activities and events, and reporting back to the leadership about issues affecting their own unit. Having active Shop Stewards in the workplace is incredibly important to the

overall health of the union, since they are the only visible presence of the union that many workers ever see. They remind your members that they are a part of an organization made up only of the employees, they 'police' the CA by paying attention to workplace practices and ensuring they conform with what has been negotiated, and they support co-workers in their dealings with management.

Some unions like to say that a Steward is needed for every 50 members but this varies. The ideal is for every Union member to regularly 'rub shoulders' with their Shop Steward. Ideally, everyone would know who their Steward is and feel comfortable approaching that person first when they have Union-related questions. Establishing and maintaining this network is usually the main task of the Chief Shop Steward, but all executive members can take part in identifying work areas in need of a Steward, encouraging members to consider serving as a Steward, and keeping in touch with existing Stewards.

Ideally, Chief Shop Stewards should meet with the Steward network regularly, often just before the monthly meeting.

### **C. Communicating with the Membership**

To lead your Local, you need to know who your members are and what they are concerned about. They also need to know who you are, what you plan to do for them, and what you expect in return. None of this is possible without strong communication. Communicating with your members is relatively straightforward in a smaller Local where you run into each other regularly (but even then, regular communication needs to be done intentionally), but it is a very different task in large Locals with hundreds of employees that you never see during your time at work. Some tips for effectively communicating with the members of your Local:

- i.) Create, maintain, and promote an online presence. There are many ways of using the internet to connect people. Some of our Locals have a Facebook group and others use the page dedicated to their Local at [www.yeu.ca/Locals](http://www.yeu.ca/Locals). You can use our website's platform to email your

members, as long as we have their up to date email address. YEU's Strategic Communications Officer can assist you with this, and can promote your site in your communications.

- ii.) Use bulletin boards to your advantage. Every collective agreement includes an article providing the Local with a dedicated Union bulletin board in every worksite. These boards just get cluttered and then ignored when they are neglected, but they can be very effective if someone continuously maintains them. Executive members don't need to take on this task themselves, but you could establish a 'bulletin board committee' or one executive member responsible for identifying someone in each worksite who will agree to care for the bulletin board, and then supplying that person with regular updates and notices.
- iii.) Using your employers email system: while it may seem tempting to contact members using your work email, this is not a good idea. First as a general rule you cannot conduct Union business using the Employer's resources unless you have explicit permission from the Employer, reflected in the collective agreement. Without that permission, you could be disciplined for misusing the Employer's email system. Second, even if the content is not sensitive or confidential, Union communications should be kept internal to Union members. When you send it to an Employer's email account, the Employer has access to it. And thirdly, obtaining a personal email address with consent to use it for Union communications is an initial, low-pressure way to involve members in the affairs of the Union. It reinforces the notion that they are a part of an employee group that does not include management. Ask members to visit our website and subscribe if they haven't already.



- iv.) Unless you have less than a couple dozen members, don't attempt to reach every member yourself to establish regular two-way communication. Rather, use the social networks that are already in place. If you can establish one person in each work area (site contact) who is willing to share information back and forth with the people they work with, then sharing a message with those members can effectively reach the whole workforce. Again, establishing this communication network is not a task that you need to take on by yourself; delegate it to the engagement committee or some volunteers.

#### **D. Organizing: encouraging involvement**

It is very rare for a Union member to take the initiative of approaching the executive and asking how they can get involved. Most people need to be asked or invited before they'll even think about the commitment they can make to their Union. However, it is likely that there are a handful of members in your Local right now who would be willing to get involved and may even be willing to serve as a Shop Steward, sit on a committee, or run for a position on your executive if they simply understood the need and were asked to consider it. With a strong communications network in place, you can find ways to get the message to these people and encourage their involvement.

Reflect on who is engaged and involved with the Local and who is not. Reach out to under-represented groups and encourage them to volunteer to be a site contact, organize a pizza lunch or take a course.

As inefficient as it seems, nothing is nearly as effective for increasing participation as a one on one conversation. Posters on a bulletin board or mass emails to the entire Local asking for volunteers might attract the attention of some members willing to step up, but for most it is far too easy to assume that someone else will respond. In contrast, an invitation to sit down for a 15- minute coffee break, a personal phone call, or even an email addressed only to one member and greeting them by name are all ways to actively involve someone in thinking about

the Union. Ideally, every member in your Local would be invited to have a conversation like this periodically. *You do not need to try to do this yourself.* The first step of recruitment is always to recruit some recruiters. Try to get three or four members to agree to speak with three or four other colleagues about getting more involved with the union.

The executive should also think creatively about how to motivate your members to take ownership of their Local and see “Union issues” as *their* issues. For example, you can build a stronger sense of community by hosting a social event for Local members only (e.g. a backyard BBQ, renting the skating rink for an hour, or putting together a softball team).

### **Meeting and Recruiting Shop Stewards**

Unions only ‘work’ when members step up and serve as Shop Stewards to promote the Union, to represent co-workers and deal with workplace issues.

Each Local should aim to have one Shop Steward for every 50 members and one at each site. Recruiting from different classifications and the diversity of the membership will help members see themselves in the union.

Everyone on the Local Executive and existing Shop Stewards should be prepared to meet and encourage natural leaders in the workplace and interested members to consider this role. Your Local by-laws may specify that a Local Officer, often the Chief Shop Steward, meet potential stewards before the posting and swearing in process begins to ensure that they have a good understanding of their role and the responsibility of the steward to represent the union. In these times of polarization, it would be good to somewhat formalize this process so that stewards not only are sanctioned by their peers through the posting and election process at their work site, but also vetted by the Local Executive. We want Stewards that are prepared to uphold union values.

## Meeting Potential Shop Stewards

Here is an approach for meeting with potential stewards that you don't already know. The best practice is to meet a potential Steward **before** any posting takes place.

Questions that start conversations include:

- Why do you want to be a steward? (what we are looking for here is interest in the common good interest rather than self-interest)
- What are some of the workplace issues that you and your co-workers talk about? (here we are looking for someone that is already talking to co-workers- have "natural" leader qualities)
- Have you been unionized before? If so, did you take on any roles? (experience is a plus!)
- What is your understanding of the role of the shop steward and of the union?
- Have you checked out the YEU website or been to the office? (this shows initiative and research abilities)
- How do you deal with your own biases, especially when they may conflict with the union's position (ie vaccine mandates) What we are looking for is some self-awareness; a willingness to learn and an orientation towards the union's values.

## Recruiting Potential Stewards

Consider the diversity of your Local's membership and try to recruit members from this diversity. Ideally your stewards reflect the full diversity of the membership: gender, seniority, race, sexual orientation, classification, work site, language, etc. Look for people who are respected by their peers and are willing to learn.

Recruiting takes time. It's normal for people to say no to your request to consider stepping up. Offer them smaller tasks and ask again. Some people need encouragement if they've never done anything like this before.

When you are trying to recruit a worker that you believe would make a good leader and they raise different reasons for not wanting to take on the role, here are some responses:

*1.) I'd rather not paint a target on my own back*

One of the most common reasons to avoid Union involvement, especially serving as a Shop Steward, is the fear of being targeted by Management. Members suspect that Shop Stewards are seen as troublemakers. By identifying as a Steward, a member fears they might be passed over for a promotion or always be scrutinized by their supervisor.

In fact, good Stewards serve the entire workplace by helping to resolve conflicts as they arise. Without good Stewards in the workplace, employee dissatisfaction tends to simmer on the backburner until it boils over, making a mess over the whole kitchen (workplace). Good managers understand that it is actually to their advantage to have good Shop Stewards in the workplace, since it is more efficient to resolve issues as they arise than to allow growing discontent among the workforce.

Furthermore, it is *illegal* for employers to intimidate or discriminate against Union representatives. Collective agreements protect Shop Stewards from the things members fear, and with the training recruits receive, they are well equipped to oppose any manager who starts picking on a new steward for their Union involvement.

*2.) Stewards need to be aggressive and adversarial. That just isn't my style.*

When some of us think of "the Union" we think of someone with an angry red face shouting and banging their fist on a table. If you don't approach conflict that way, you think that maybe Stewarding is best left to someone more prone to yelling.

In fact, Stewards very rarely have cause to bang a fist on a table. For the most part, and especially at the initial stages of any complaint process, Stewards are encouraged to engage management with a collaborative, problem-solving approach (while still representing the interests of the member involved). Sometimes, when a grievance goes unresolved and escalates to higher levels, the Union needs to be more forceful in our position. In those cases, however, we have Union leaders and Labour Relations Advisors with special training in banging fists on tables.

*3.) I don't know if I support the Union enough to be involved*

Many union members don't know a lot about what the Union does with the dues and some folks may have a very low opinion of the Union. A member may not be sure that the Union is worth putting their energy into.

A good response to this is to find out what matters to the member. Say it is that their co-workers don't complain when their Special Leave is denied. You can explain that more members would complain and assert their rights if there was a Steward to coach and back them up. The union works on issues that come up from the workplace. And it is only as strong as the engagement of its members.

There are other ways to get involved that may be good entry points for members: Health and Safety Committee Reps; Local Organizer; member of one of PSAC's Committees (Women, Pride, Access, Youth, Health and Safety, Indigenous Peoples)

*4.) I don't know enough about the Collective Agreement and the grievance process.*

Shop Stewards need to know all sorts of things about the Collective Agreement, employer policies, and current laws about things like harassment and accommodation of disability. It can seem overwhelming to a member who isn't already familiar with these tools.

You can explain to a potential steward that they will learn everything that they need to perform the role during the Shop Steward Orientation. They will have a mentor who can assist them in the first few months and there are on-going learning opportunities.

All a member really needs is the willingness to learn; we will provide the opportunity.

*5.) I don't have the time*

We all have full plates with full-time work, obligations at home, and in our communities. How can we expect a member to volunteer even more time to serve as a Shop Steward?

Shop Stewarding does require some volunteer time, but over 100 Yukoners are YEU Stewards do it and find that it is time well spent. Assisting co-workers in having their rights respected is rewarding and empowering. However, being a Steward need not demand as much of time as feared. Much of the official work as a Steward is done during paid working hours, and the Union compensates any loss of salary for much of the training that is needed. Also, as a volunteer, Stewards control their own workload.

The truth is that many of the benefits enjoyed in workplaces were won by everyday members who recognized the importance of getting involved with their Union.

## **Executive Meetings**

All Locals must hold an Annual General Meeting open to every member (more on this next), but the Executive Board should also be meeting regularly throughout the year. Your by-laws may specify how frequently these meetings are to take place; often Executives hold a monthly meeting at the same time and location. Meeting space (including a conference call system) is available at the Union Hall in Whitehorse, and it can be booked in advance by contacting our Member Services Assistant.

Once you have decided on a regular time/location, you can post information about it to your bulletin boards and/or advertise in on YEU's Events Calendar. Depending on your bylaws, your members can request that an item be added to the meeting agenda or attend as observers. In any case it is good communication to let your Local know that their executive meets regularly to consider their issues.

Before each meeting someone (often the President, but this task could be done by the Secretary or someone else) should send a reminder notice to the other Executive members, and then circulate a meeting Agenda. Its purpose is to get executive members thinking about the issues to be discussed prior to the meeting. Also, if you circulate this in advance you can ask for items that need to be added. A sample Agenda is included in the Resources at the end of this Handbook.

In order to conduct any Local business at these meetings, you must have quorum (a minimum number of attendees), which will be defined in your bylaws. Often quorum is established by having either the President or the Vice-President, and both the Secretary/Treasurer and the Chief Shop Steward. The meeting will have to be rescheduled if you know ahead of time that you will not meet quorum. Minutes should be taken (usually by the Secretary) at every Executive meeting. These minutes stay in your own secure storage and might be referred back to at the next AGM, when the Executive reports to the members on their activity. Minutes don't need to be overly detailed, but should include data such as time/location of the meeting,

members in attendance, and the main points of reports given and decisions made. An example of meeting minutes and a blank template for taking them are included in the Resources section.

### **E. Annual General Meeting**

The AGM is the main decision-making body at the Local level. At the AGM your Local's members elect the leadership team, make amendments to your bylaws, approve a budget and set the general mandate for the coming year. Because of this, it is important to get as many members of your Local to participate in the AGM as possible. To do this, you'll want to set a date/time/location that is likely to accommodate most schedules, and then advertise it well in advance (using as many forms of communication as you can). In most bylaws there is a requirement to inform your members of an upcoming AGM at least 30 days in advance. If your budget permits, it is worth setting aside some funds for pizza or other refreshments, and perhaps also for door prizes to get more members to attend. You'll need a member of the YEU Executive Board to attend your AGM and facilitate elections. The Local Officers will each be expected to deliver a report on their activities over the year, and the Executive Board as a whole will prepare and propose a budget for the coming year. This all needs to be arranged in advance, so preparations for an AGM should begin at least 6 weeks prior to the date you hope to hold it on. A checklist and suggested timeline for AGM preparation is included in the **Resource section**.

In all official meetings you are involved in as a Local officer there is a need to conduct business efficiently. To that end, it is worth utilizing the PSAC Rules of Order, at least in an informal manner (from page 51). Generally, meetings should be conducted more formally the more participants they involve, or the greater the importance of the business to be conducted. In a monthly meeting of four Local officers there is no need to insist that suggestions be made as formal 'motions', or that they get 'seconded' before being opened for discussion. Even in those meetings, however, minutes should be taken and a record kept of when the meeting was held and who attended. In an AGM with several dozen participants, a more formal process is called for. For example, to ask that members be recognized by the chair before speaking makes

sense. Included in the Resource section are the Rules of Order that YEU observes at Triennial Convention, together with a short guide for those unfamiliar with formal meetings.

#### **F. Delegating Work and Establishing Committees**

The Local Executive Board has the ability to create committees responsible for certain areas of Local concern. Committees can be ‘standing’ if they are ongoing or regularly recurring, or ‘ad hoc’ if they are formed to deal with one particular situation and dissolved when that situation is resolved. Standing committees usually need to be chaired by a member of the Executive team, but most can include any interested member of the Local. Your bylaws may specify certain standing committees, such as Joint Consultation (responsible for identifying issues among the membership that can’t be resolved through the grievance process, and referring these issues to the YEU Executive or to a Joint Labour Management meeting), Membership and Public Relations (responsible for keeping lines of communication open both internally (between members and the Local executive) and externally (between the Local and the rest of the community)), and Bargaining Input (responsible for gathering proposals for the bargaining team when you are preparing to negotiate a new Collective Agreement).

Establishing and maintaining well-functioning committees is important for at least two reasons: First, it shares the burden of managing the Local among more people, so that the Executive team doesn’t end up doing everything on their own. Second, it is a great way to involve members in the Union without the commitment of taking a position as a Shop Steward or as an Executive Officer.

Some of the standing committees are described in your bylaws, but you can also get creative with forming new ones. Committees can establish their own meeting schedule and division of tasks and may also be assigned some funds in the annual budget. Committees should also plan to provide a report on their activities to the AGM.



## **G. Managing Local Finances**

The major expenses for administration, training, legal and representation fees, etc. are paid by PSAC or YEU, but Locals also get a modest remittance of dues for Local expenses (\$1 per member per month for Locals of up to 400 members, and \$0.50 per member per month for each additional member). These funds are to cover basic operating expenses like photocopying, office supplies and food/refreshments for your AGM or other Local meetings through the year. Beyond that, your Local decides what to do with them. Many Locals set aside some money for retirement gifts, a hardship fund for members in need, community charitable donations, or raffle prizes to get a better turnout at your AGM. There are many ways to use Local funds to build strength among your membership or to help out others in the community; unless your members have planned a project that you need to save for your budget should not include any surplus to be banked.

As Executive Officers you are always accountable to the rest of your membership for handling of finances. Local funds are to be deposited into a bank account requiring two signatures to access (usually the Treasurer and the President).

Check that all expenses have been approved by the membership and that each expense is accompanied by an invoice or expense claim before signing any cheques. Never sign blank cheques or cheques made out “cash” or to the Treasurer.

Remember that you’ll need to transfer signing authority when you have a change in Executive. Your Treasurer will keep a detailed record of expenditures and will present this report to the AGM and to the YEU Executive. A sample financial report is included in the Resource Section, as is a sample Proposed Budget to be presented at an AGM.

Finally, keep in mind that with 2/3 majority support from the attendees at your Local AGM, you can place a special levy on your members to increase your revenue. This is done rarely, and only when there is some particular need for the extra finances. YEU’s bylaws require you to submit such proposals, along with a rationale and an approved budget, to YEU’s Executive.

## **H. Roles of the Executive Positions**

The roles and responsibilities are specified in your Local's by-laws. The following are general guidelines for the various executive positions.

### **President**

The President is responsible for the overall leadership of the Local and is the primary link with the YEU.

The President generally chairs meetings and makes sure that all officers of the Local's executive are assuming their responsibilities.

The President will usually attend union-management meetings to raise and resolve workplace issues.

The President needs to identify workplace issues by maintaining good communication with members.

The President will usually co-sign all cheques along with the treasurer.

Some suggestions of Duties of the President from model By-laws:

#### **Membership Meetings:**

- Chairs membership meetings
- Casts deciding vote in event of tie
- Reports on their activities
- Sees that motions from previous meetings have been carried out

#### **Executive Meetings:**

- Leads discussions on future plans for Local activities
- Assigns people to carry out tasks voted on by membership and sets deadlines

**General Leadership:**

- General oversight over the Local's affairs
- Enforces the Local's By-laws and PSAC constitution
- Signs all cheques and official documents
- Acts as official spokesperson
- Recruits members for roles in the Local
- Engages with members by organizing workplace visits, lunch time meetings and generally represents the union with the members
- Represent union at regular Joint Labour-Management meetings

**Vice-President**

The Vice-President performs the duties of the President in the absence of the President.

A Vice-President often acts as chair of meetings when the President want to speak more because it is hard to chair and speak at the same time.

Additional specific duties may be assigned to the position of Vice-President in your by-laws.

These could include: communications with membership, member to member conflict resolution and member mobilization and education.

**Chief Shop Steward**

Larger Locals will often have a member of the Executive that is responsible for the recruitment, support and development of the Shop Stewards. Ideally, each worksite should have at least one Shop Steward to have a union presence. The Chief Shop Steward meets with the Shop Stewards to discuss workplace issues and increase knowledge. These meetings can take place before the executive meetings or at the workplace, wherever it is most suitable to meet.

The Chief Shop Steward can then report to the Executive and specify issues that need to be taken up to Joint Labour-Management meetings or propose additional training plan that meets the Local's stewards' needs.

See Appendix H for more on the role of the Chief Shop Steward.

## **Treasurer**

The Treasurer is responsible for the Local's money. This means assuring that the amount of dues coming in is sufficient to carry out the activities that advance the members' interests. The Treasurer also ensures that the spending priorities reflects the Local's goals and the money spent is in accordance to the by-laws and wishes of membership as voiced at meetings.

All financial administration duties fall to the Treasurer: maintaining records of size of membership, monthly dues, recording of expenses, preparing financial statements at AGM and as needed.

The Treasurer must keep the membership informed about the financial health of the Local.

Some suggestions of duties of the Treasurer from model By-laws:

### **Income and Deposits**

- Maintain records of size of membership and dues
- Receive all deposits
- Write receipts for all cash received

### **Expenses**

- Write and co-sign cheque for all disbursements
- Receive a receipt or expense voucher for all disbursements
- Record transactions
- Obtain approval for all non-routine expenses

### **Financial Records**

- Record transactions
- Prepare and present financial report to executive and to AGM
- Maintain files for all expenses and receipts

### **Financial Advisor**

- Prepare yearly budget for Local -projected income and expenditures
- Advise executive and membership on the costs of proposed activities

## **Secretary**

The Secretary is responsible for maintaining the records of the Local's meetings and sending the AGM minutes to YEU. Communication with members, whether by bulletin board notices, a Local Facebook Page or by email is often also a responsibility of the Secretary. A good Secretary will write up and post (or email) notices of meetings and summaries of important meetings.

It is always helpful for the Secretary to recruit volunteers to help with communications. One member can maintain the Local's Facebook page. Another can recruit members in each worksite to keep the bulletin board updated.

Some suggestions of Duties of the Secretary from model By-laws:

Record Keeping:

- Takes minutes at Executive and AGM
- Stores minutes and sends AGM minutes to YEU

## **Communication:**

- Prepares meeting notices and agendas
- Circulates minutes
- Receives, logs and distributes incoming communications
- Develops and distributes correspondence list
- Maintain bulletin board or network of bulletin board volunteers
- Creates and maintains Local's social media accounts in coordination with YEU communications staff

## **I. Conclusion**

Part of the importance of regular meetings of the Executive team is to ensure that you all have the opportunity to support one another. Unions are all about cooperation and collaboration and no Local Officer should feel that they are left to figure things out on their own. Share contact information with one another and commit to regular informal check-ins as well as

regular scheduled meetings. Additionally, support is always available from the elected Leaders and the staff of YEU and PSAC.

#### Additional Resources

- A. Sample AGM Agenda**
- B. AGM Checklist**
- C. Contact List**
- D. Financial Statements & Budgets**
- E. Meeting Minutes**
- F. Rules of Order**
- G. Guide to Chairing a Meeting**
- H. Job Description of Chief Shop Steward**
- I. Unions and Inclusive Language**



A

## Sample AGM Agenda

### Local Annual General Meeting Agenda

**Local:** Y099

**Time:** 6:00 pm

**Date:** November 12, 2017

**Location:** YEU Training Hall

1. Call to Order
2. Welcome from YEU President
3. Adoption of Agenda
4. Reports
  - a. President's Report
  - b. VP's Report
  - c. Secretary/Treasurer's Report
    - i. Financial update and review of current budget
  - d. Chief Shop Steward's Report
  - e. Director Reports
  - f. Committee Reports
5. New Business
  - a. Resolution to amend Bylaw #6
  - b. Resolution to form pre-bargaining committee
  - c. Proposal and adoption of new budget
  - d. Suggestions for charitable donations
  - e. Submissions from the floor
6. Odd-year elections (facilitated by YEU President)
  - a. President
  - b. Chief Shop Steward
  - c. One Director
7. Adjournment



## B Preparing for an AGM - Checklist

### 6 weeks in advance

- ☐ Set a date, time and location
- ☐ Complete the [online YEU Local Meeting Planner form](#) to book a room, request YEU staff support etc. **This is critical!**
- ☐ Confirm availability of YEU President or Vice-President with Membership Services @ YEU
- ☐ Book a meeting space
- ☐ Consider ways to boost participation (provide dinner, door prizes, etc.)
- ☐ Put someone in charge of designing advertising posters for bulletin boards, website, newsletter, etc. YEU Communications Officer can assist with this but must get adequate notice

### 4 weeks in advance

- ☐ Give notice to all members of upcoming AGM (\*\*\*) most Bylaws require a minimum of 30 days' notice. YEU staff will support this by sending scheduled email blasts at 31 days before, the meeting with a reminder at 2 weeks, and another the day before.
- ☐ Request advertisement on YEU's Event Calendar, website, or social media outlets
- ☐ Request RSVP's through the YEU Website's event page.
- ☐ Request zoom support if needed
- ☐ All Executive members begin preparing reports
- ☐ Advise any active committees to begin preparing a report
- ☐ Develop a budget proposal

### 2 weeks in advance

- ☐ Send reminder to all members (YEU staff will schedule and do this upon request)
- ☐ Submit Agenda items to YEU if you wish them added to the event page for members to access
- ☐ Circulate proposed agenda to all confirmed attendees or to all members; request input and additions

### 1 week in advance

- ☐ Send reminder to all members (Email blast by YEU staff)
- ☐ Circulate final agenda to all confirmed attendees or to all members



- ☐ Purchase door prizes (if applicable)
- ☐ Make arrangements for food/refreshments (if applicable)
- ☐ Executives finalize a budget proposal
- ☐ Review Rules of Order

## **Day of AGM**

### **Final preparations**

- ☐ Set up room; arrange tables/chairs
- ☐ Pick up and set out food, refreshments and/or door prizes
- ☐ Print copies of agenda, financial statement, proposed budget, etc. Printing is done at the Local's expense, and should be done at a location such as Staples' Business Centre.
- ☐ Meet YEU Executive member

### **During the meeting**

- ☐ Local President chairs meeting, following the agenda and the rules of order
- ☐ YEU Executive facilitates elections
- ☐ Strive to begin and end on time

### **After the meeting**

- ☐ Clean up and leave room as you found it
- ☐ Ensure all nomination forms and executive change forms are completed and signed
- ☐ Inform membership of business completed, including decisions made and officers elected to the Executive
- ☐ Schedule an executive meeting to orient new officers



### C. Contact List for Local

<u>Name</u>	<u>Position</u>	<u>1<sup>st</sup> Phone</u>	<u>2<sup>nd</sup> Phone</u>	<u>Email</u>
Steve Geick	YEU President	667-2331 ext.1009	335- 2631	<a href="mailto:sgeick@yeu.ca">sgeick@yeu.ca</a>
Justin Lemphers	YEU VP (Whitehorse)	667-2331 ext.1010		<a href="mailto:jlemphers@yeu.ca">mailto:jlemphers@yeu.ca</a>
Tony Thomas	YEU 2 <sup>nd</sup> VP (Communities)	335-2630		<a href="mailto:tthomas@yeu.ca">tthomas@yeu.ca</a>
	YEU Intake Officer	667-2331 ext.1001		
Tammy Olson	YEU Executive Director	667-2331 ext.1006		<a href="mailto:tolson@yeu.ca">tolson@yeu.ca</a>
Deborah Turner-Davis	YEU Director of Communications	667-2331 ext.1007		<a href="mailto:dturner-davis@yeu.ca">dturner-davis@yeu.ca</a>
Shawna Dalley	PSAC Whitehorse	668-8593		<a href="mailto:dalleys@psac-afpc.com">dalleys@psac-afpc.com</a>
	Local President			
	Local VP			
	Local Secretary			
	Local Treasurer			
	Local Chief Shop Steward			
	Local Director			
	Local Director			
	Local Shop Steward			
	Local Shop Steward			
	Local Shop Steward			



## D. Sample Financial Statements & Budgets

### Local Y099 Financial Report

**DATE:** September 20, 2017  
**TO:** Members of Local Y099  
**FROM:** Elsa Jones, Y099 Treasurer  
**SUBJECT:** Treasurer's report and financial statement for the period August 22, 2016 to September 19, 2017

#### Summary

- The approved budget for the year projected \$0 surplus, \$0 deficit
- The actual excess of income over expenses for the year was **\$15.11**
- Our current bank account balance is **\$861.27**, and our total current equity is **\$1293.11**
- YEUP has issued dues rebates through the end of May 2017. The next dues rebate check will form part of next year's budget.

#### D. Financial Statements & Budgets

##### Statement of Financial Position as of September 19, 2017

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#### ASSETS:

Cash (bank balance at TD)	\$861.27
Laptop (estimated current value)	\$295.42
Barbeque (estimated current value)	\$136.42

TOTAL:	<b>\$1,293.11</b>
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#### LIABILITIES:

TOTAL:	<b>\$0.00</b>
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#### EQUITY:

	<b>\$1,293.11</b>
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## D. Financial Statements & Budgets

### Statement of Financial Activity for the Period August 22, 2016 to September 19, 2017

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**STARTING BALANCE:**

**\$846.16**

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**INCOME:**

Dues Rebate: \$1,596.00

Interest: \$77.28

**TOTAL: \$1,673.28**

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**EXPENDITURES:**

Compensation for Executive Meetings \$390.00

Donation (Whitehorse Food Bank) \$200.00

Food (AGM 8/22, SGM 4/7) \$300.00

Long Service Gifts (G. Smith, K. Fischer, M. Brown) \$206.37

Office Supplies \$45.66

Photocopying \$56.10

Retirement Gift (R. Jones) \$151.86

Rental Fee for Fun Skate 10/17 \$308.18

**TOTAL: \$1,658.17**

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**SURPLUS / DEFICIT:**

**+ \$15.11**

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**CLOSING BALANCE:**

**\$861.27**

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**D. Financial Statements & Budgets**

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**Proposed Budget for the Period September 20, 2017 to September 18, 2018**

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**STARTING BALANCE:**

**\$861.27**

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**INCOME:**

Dues Rebate:	\$1,596.00
Interest:	\$75.00

TOTAL:	<b>\$1,671.00</b>
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**EXPENDITURES:**

Compensation for Executive Meetings	\$400.00
Food (AGM, Bargaining Input Meeting)	\$500.00
Office Supplies & Photocopying	\$75.00
Donations	\$200.00
Gifts	\$300.00
Local Development	\$200.00

TOTAL:	<b>\$1675.00</b>
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**PROJECTED SURPLUS / DEFICIT:**

**- \$4.00**

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**PROJECTED CLOSING BALANCE:**

**\$857.27**



**E. ~~Template Local Executive Meeting Minutes~~**

Local:

Time:

Date:

Location:

Attendees:

Chair:

Executives not in attendance:

Reason given?

Approval of Agenda

Reports

Unfinished Business

New Business

Announcements

Minutes prepared by:

\_\_\_\_\_



#### **F. YEU Rules of Order (used at YEU Convention)**

1. The President, or in the absence of the President or on the delegation of the President, a Vice-President, shall take the Chair and shall preside.
2. Delegates wishing to speak shall proceed to one of the microphones provided for that purpose. When recognized by the Chairperson they shall give their name, state the purpose for which they rise, and confine their remarks to the questions at issue.
3. Speeches shall be limited to three (3) minutes.
4. A delegate shall not speak more than once upon a subject until all who wish to speak have had an opportunity to do so.
5. A delegate shall not interrupt another, except to rise to a point of order or question of privilege.
6. A delegate called to order shall, at the request of the Chairperson, take a seat until the question of order has been decided.
7. In the event of a tie vote on any matter other than the election of officers, the Chairperson may cast a deciding vote. The Chairperson shall not take part in a debate without leaving the Chair.
8.
  - a) Any motion or amendment to a motion may be amended, provided the amendment is relevant to the question and does not have the effect of simply negating the question.
  - b) Amendments are always voted on in reverse order to their introduction. That is, the second amendment must be disposed of before the amendment and the amendment must be voted on before the main motion.
9. The report of a committee, when adopted, becomes the decision of the Convention that adopted it.
10. The following motions shall be in order at any time and in the order stated:
  - a) To adjourn (not debateable)
  - b) To recess (not debateable)

## **G. Guide to Chairing a Meeting**

### **CONDUCTING A LOCAL UNION MEETING**

The Local membership meeting is the heart of the democratic trade union, and its decisions are the pulse of the organization. It would be hard to over-emphasize the importance and value of Local union meetings. It is here that the union's membership makes decisions concerning the goals, activities, and direction of the Local. One of the most important leadership tasks is to make membership meetings interesting and exciting events, where members--new and old alike--feel welcome to attend and participate.

A membership meeting should be a forum to:

- Inform the membership (and learn from the membership) about what is happening, what might be happening, and why.
- Conduct union business by allowing the membership to discuss issues and make decisions on implementing the Local's policies and programs.
- Build unity and solidarity within the Local.

### **A Checklist: Productive Meetings**

- Carefully plan and organize the meeting's agenda, ahead of time. This is the task of the President and the Executive Board.
- Provide the membership with advance notice. Use leaflets, newsletters, bulletin boards, public service radio & television--or a combination of methods.
- Be sure the meeting place is comfortable, convenient, and accessible to all members.  
Start the meeting on time!
- Run the meeting efficiently, smoothly, and democratically. End the meeting on time!

## Parliamentary Procedure

One of the President's main responsibilities is chairing the Local meeting. A meeting's business is conducted through the process of the membership recommending, discussing, and deciding on a course of action for each issue that is brought forward. This is all done by following a set of rules, called parliamentary procedure, which ensures that decisions are made in an orderly and democratic manner. (And though the President chairs most meetings, all union leaders should know the "ground rules".)

The foundation of parliamentary procedure rests on these four cornerstones of democracy:

- During a meeting, every member has the same rights--and responsibilities--as every other member.
- Only one question is considered at a time--this avoids confusion.
- The majority rules -- always.
- Individual members have rights that the majority cannot take away--namely, the right to be heard, no matter how unpopular the opinion may be.

Here is a brief description of how parliamentary procedure works:

A MOTION--seeking the Local to take some course of action--is made from the floor.

The Chair asks if there is a SECOND for the motion. (For a motion to be discussed, it must be seconded from the floor). The Chair asks if there is DISCUSSION of the motion. When RECOGNIZED by the Chair, members may SPEAK TO (discuss) the motion. When the discussion has run its course or has been CLOSED, the chair requests and conducts a vote on the motion.

During discussion, motions may be AMENDED by the membership--through discussion and a vote. Once made, all motions must be DISPOSED OF in some fashion--by being PASSED, DEFEATED, TABLED, REFERRED, or PLACED IN COMMITTEE.

(For more detailed information about parliamentary procedure, see *Robert's Rules of Order; How to Chair a Meeting*.)

## **Making a Motion**

The meeting has been opened. The minutes have been read. Business is halted. Everyone begins to speak at once. This would mean bedlam; so a procedure has been agreed upon to start the process and to keep it smooth. The minutes can only be accepted if a motion is made. Motions are the channels through which all business moves. **To make a motion is to make a proposal.** It is a verbal, orderly way of initiating action.

Thus, if a member wishes to make a proposal of any kind, he rises, is "recognized" by the chair through word or sign, and says, for example, "Brother Chairman, I move that we hear from Brother Jones' Committee the facts about the change in the shift schedule and how it may affect our members."

In effect, this gives the meeting an idea for consideration. If someone rises to say "I second the motion," the meeting must discuss the proposal. If no one seconds it, it cannot be discussed and the meeting Proceeds to other business.

A motion is "in order" if:

- It is related to the business present before the meeting.
- It conforms to the fixed order of business.
- It is in harmony with the rules of order. For example, a motion to give aid to Tammy Jones, who is unemployed, is not "in order" during a discussion about the payment of bills.

If a motion does not meet these tests, the Chair should rule it out of order. But the Chairperson may be wrong; therefore, any member has the right to appeal the Chair's ruling. To this Brother Smith says, "I rise to appeal the decision of the Chair."

Sister Brown says, "I second the appeal." At that moment, the Chair sheds its power. The Vice-Chair or Secretary must now preside. Brother Smith is then allowed to explain his reasons for appeal. The Chairperson is allowed to rise and explain the ruling. All other business stops. This motion is not debatable. The temporary Chair puts the question, "Shall the ruling of the Chair be sustained?"

This question is now voted upon in the usual fashion. If the Chair is defeated, the original motion is in order. If sustained, the meeting goes forward to new business. In any event, the chairperson does not preside over the meeting pending settlement.

### **The Role of the Chairperson**

The ability to run an effective meeting requires more than knowing all the "Ins" and "Outs" of parliamentary procedure. The skilled chairperson learns, through experience and by using good old-fashioned common sense, how to apply those rules for the benefit of the membership.

During the course of any meeting, the chairperson must make many decisions when applying parliamentary procedures. In making those decisions, the chairperson walks a fine line. If the Chair is too technical and precise, members may feel intimidated and won't participate in the discussions. On the other hand, if the Chair is too easy-going and doesn't exercise proper control, the meeting can easily bog down and very little will be accomplished.

A Checklist: Chairing a Meeting

- Make sure all business is in the form of a motion (which must be seconded), and that all motions are stated clearly so everyone understands. If necessary, ask the member to re-state an unclear motion.
- Be certain that members have enough information to make a decision on any motion.
- Keep the "long-winded" member from talking too much and dominating the discussion--if necessary, establish and enforce a time limit for each speaker.
- Protect every member's right to speak--even when he or she is expressing an unpopular opinion.
- During the course of a meeting, educate members about parliamentary procedure--don't let it be used to confuse them. For example, when a member speaks out of turn, don't simply say, "You're out of order." Explain why the person is out of order and explain when and how the member can make his/her point.
- If you wish to speak on a motion, turn the gavel over to the Vice-President until action on that motion is completed. This ensures the "neutrality of the chair."
- Try to view criticism of the activities of the Local as an opportunity to ask what should the Local be doing. Unless a proposal is outrageous, ask the critical member to make a motion proposing a solution to a problem and ask them to work on the implementation of the proposal. Chairing a meeting also involves using every opportunity to find volunteers and get members more engaged.

## **Chairing a Meeting In 10 Easy Steps**

The Local President has the responsibility of chairing two types of meetings: membership meetings and Executive Board meetings. While no two meetings will have the exact same activities, here is a ten-step guide to conducting an effective and productive meeting.

### *Step 1 -- Call to Order*

President: Rap your gavel and declare: "I call this meeting to order!" "Brothers and Sisters, a sufficient number of officers and members being present, I declare this meeting duly convened and qualified to consider and transact such business as may come before it that is recognized by the Brotherhood of Maintenance of Way Employees Division-International Brotherhood of Teamsters. All who are not members will please retire."

#### *Step 2 -- Roll Call of Officers*

"The Recording Secretary will call the roll of officers."

The Recording Secretary then calls the roll in a clear voice, providing pauses for each officer's response.

#### *Step 3 -- Reading of Minutes*

"The Recording Secretary will read the minutes from the previous meeting." The Recording Secretary then reads the minutes in a loud, clear voice:

"Are there any additions or corrections to the minutes? (pause) If not, the minutes stand approved as read."

If there are corrections, ask for unanimous consent to approve the minutes as corrected; or ask

"Does the Chair hear a motion to approve the minutes as corrected?"

The last phrase is used when a member has made a correction in the minutes. In a similar way, all reports made by members or by committees are "received" or are "accepted." To "receive" a report means simply to give it to the secretary. To "accept" a report is to furnish it with the approval of the whole body.

#### *Step 4 -- Reading of Correspondence*

"The Recording Secretary will read the correspondence."

Letters requiring action by the membership should be discussed by the Executive Board before the meeting. At the membership meeting, the Recording Secretary should read these letters along with any recommendations for action by the Board.

Ask “Does the Chair hear a motion to accept the recommendation of the Board?” The Recording Secretary should summarize any lengthy or routine letters.

#### *Step 5 -- Officer Reports*

“We will now have the officers’ reports.”

The President's Report: Should include any actions taken by the Executive Board at its last meeting and the agenda for this meeting. Copies of the agenda and minutes of the most recent Executive Board meeting may be distributed. The President might also report on the Local's priorities and what direction and action the Local should take.

The Secretary-Treasurer's Report: Should be photocopied and distributed at the meeting. The Secretary-Treasurer then reviews the report and answers any questions.

Other officers: Reports should be provided by those (e.g. the Vice-President or Executive Board members) who have responsibility for a particular activity in the Local.

After each report: “Does the Chair hear a motion to accept the report of the [office title]?”

#### *Step 6 -- Reports of Committees and Staff*

“We will now have committee and staff reports.”

Committee Reports: Committee chairperson should describe the committee's activities and/or progress on a project; the report may include a recommended action which the committee wishes the membership to take.

After each report: “You have heard the report of the [name of the committee]. Is there a motion to accept the report?”

#### *Step 7 -- Unfinished Business*

“Is there any unfinished business?”



This includes any items left over or referred from a previous meeting, which require action by the membership. A motion from the floor can be made which addresses a specific topic.

#### *Step 8 -- New Business*

“Is there any new business?”

This includes items raised at this meeting which were not necessarily on the agenda, but which require membership action. A motion from the floor may be made addressing a specific issue.

#### *Step 9 -- Good and Welfare*

“Is there any good and welfare?”

This provides the members an opportunity to discuss the general welfare of the union. Such activities as guest speakers, acknowledgments, updates on a member who is ill, etc. can take place during this portion of the meeting.

#### *Step 10 -- Adjournment*

The last of all motions is the motion to adjourn:

“Do I hear a motion to adjourn?” Brother Jones : “I move that we adjourn.” Sister Hunt : “I second the motion.”

President : “There being no further business before our Local, we will proceed to close. By virtue of my office, I now declare this meeting adjourned.”

A motion for adjournment is not debatable. If passed, this concludes the membership meeting.

## **Appendix H Chief Steward: Roles & Responsibilities**

(adapted from SGEU)

You are a workplace leader who represents YEU, coordinates Stewards, and enforces the Collective Agreement (CA). You work collectively with stewards, elected leaders, and YEU staff in your workplace, bargaining unit, and sector. You also deal with management on behalf of the union. As Chief Steward, you fulfill the duties of a Steward, but also work with other Stewards in your zone to do the following:

### **Communication**

- Encourage Stewards to approach you with questions about processes, contract interpretation, and reports of workplace conflicts and issues.
- Advise Stewards and other members about union activities and advise bargaining unit and sector leaders about workplace developments.
- Ensure new member orientations are occurring as needed.
- Ensure you have a strong relationship with the assigned YEU Labour Relations Officer.
- Inform Stewards and members about changes in or interpretation of the CBA or as well as relevant arbitration decisions.
- Be accessible to Stewards by telephone or in person.

### **Conflict Resolution**

- Assist in resolving conflicts between members and Stewards or between members and the employer.
- Be knowledgeable about both workplace and union harassment policies and procedures.
- Encourage Stewards to talk to you when they encounter harassment in the union or in the workplace, and work with Stewards and/or the YEU Labour Relations Officer to resolve the problem.
- Hold regular meetings of all Stewards. Topics should include current workplace issues, barriers facing equity-group Stewards, discrimination/harassment of Stewards in the union and the workplace, and strategies to address issues.
- Work to dispel, not encourage, rumors.

### **Grievance Co-ordination**

- Assign complaints and grievances to Stewards in your zone, taking into account:
  - Stewards' specialized knowledge
  - The chance for new Stewards to gain experience
  - The need to prevent Steward burn-out.
- Respect members' right to work with the Steward of their choice. Assist Stewards, as needed, in writing and investigating grievances properly, and in judging whether a complaint is a grievance.

- In communications with the YEU Labour Relations Officer, keep track of filed grievances and ensure the necessary tasks are completed.
- Inform Stewards that all grievances are to be fully investigated in order to identify any violations of the collective agreement and/or any other statutes or laws, before being filed. Educate Stewards on the internal appeal processes.
- Ensure contract enforcement by:
- Not agreeing to any deal that violates the provisions in the CBA or any other rights defined in a statute.
- Challenging violations of the CA and other rights defined in a statute.

### **Leadership**

- Promote maximum involvement by members in union activities, especially within the collective bargaining process.
- Delegate duties to Stewards (and to panel reps where relevant)
- Call and chair regular Steward meetings to share information, identify best practices, and review grievances and other workplace issues.
- Chair other meetings when necessary, such as membership or union-management committee meetings. **Mentoring & Training**
- Ensure you are familiar with your CBA, related legislation, workplace policies and procedures, YEU policies, the Steward Manual, and union resource people.
- Complete training as set out in YEU policy.
- Orient new Stewards, and support them to meet the expectations set out in the Steward job description.

### **Mentoring Arrangements for New Stewards**

- Encourage Stewards to take appropriate training
- Update Stewards about education opportunities
- Encourage Stewards to set appropriate limits to prevent stress and burn-out.

### **Administrative Duties**

- Ensure elections are held for positions of Stewards and reps for your workplace OH & S committee.
- Ensure that Stewards are registered with YEU membership records after each election.
- Ensure distribution and posting of union information within your zone.

### **Recruitment**

- Actively recruit new Stewards with the goal of achieving a representative and inclusive Steward body in YEU.
- Recruit members who want to do other jobs like answer members questions, organize workplaces and keep everyone informed, keep bulletin board up-dated, volunteer for special events and picket line support.

## **Appendix I: Unions and Inclusive Language**

You may have noticed that in the union movement we traditionally refer to each other as Sisters and Brothers. This tradition originates from the craft unions from over a century ago. These unions were all male and the term Brother reinforced solidarity. It is a much warmer and stronger greeting to say to someone you don't know on a picket line, "Hi Brother", than to say "Hi". As women entered the unions and demanded inclusion, we added Sisters to our vocabulary.

Today, this strict gender binary clashes with our goal of full inclusion. Union activists are demanding full inclusion of trans and members with non-binary and fluid gender identities. Consider using alternatives: "Sisters, Brothers and Friends", "Fellow workers", "Folks", "Comrades" or "Unionists".

By using inclusive language, you won't run the risk of misgendering members and everyone will feel part of our movement.

## Conducting Local Elections

### Part 1 — Before the Meeting

Ensure that all members are aware and are given sufficient notice of the upcoming election. Your bylaws may specify that 30 or more days notice be given. Depending on the size and physical distribution of your membership, this can be done by notice-posting, by desk-drop, by e-mail or by telephone.

Circulate a reminder notice at least two work-days before the meeting.

Make sure you have sufficient space and seating for the expected number of attendees. Have extra chairs available on hand if needed.

Ensure there are sufficient quantities of materials to be used during the meeting (i.e. agendas, reports, necessary documents, ballot books, etc.)

Select an Elections Chair, such as a YEU full-time officer or a member who is not seeking an elected position to your Local.

### Part 2 — At the Meeting

Separate voting members/delegates and those who cannot vote (i.e. guests, observers).

If necessary, hold a roll-call of members/delegates and distribute ballot books to those qualified to vote.

Advise the group that the Elections Chair will run the election. Before turning the meeting over to this person, it might be a good idea to explain to the membership which positions are up for election and briefly describe what is expected of each position on the executive.

The Elections Chair will explain the use of the following procedure outlined below:

- Begin the election by calling for nominations. Note that all nominations have to be duly moved and seconded;
- Read out any nominations submitted in writing up to that time;
- Call for nominations from the floor a total of three times, by asking **“Are there any other nominations? Are there any other nominations? Are there any other nominations?”**;
- If no nominations are made from the floor, or when all nominations have been made, declare the nominations process closed;
- Ask the individuals nominated if they wish to stand for office. Those who do not wish to stand will have their names deleted from the list of candidates. Where a

- nominated candidate is unable to attend the election meeting, another member may vouch that the absent person has agreed to stand for office;
- An unopposed candidate for a position may be declared as acclaimed. He or she should be offered the opportunity to make any brief remarks of intent, thanks, etc;
  - In order of their nomination, ask candidates in contested positions if they wish to speak or have someone else present speak on their behalf. Also ask if they wish to have a scrutineer (i.e. a representative) present during the vote count;
  - Each candidate has a total of three minutes to speak. Enforce this. To avoid any suggestion of favouritism, use a digital watch or other device to time the three minutes;
  - At the end of the candidate speeches, before beginning the balloting process, order the door(s) to be 'tiled' (or, closed), preventing anyone from leaving or entering the room until the balloting is completed and the results have been announced;
  - A separate page in the ballot book should be used for each position contested. Start each individual election by announcing which number or coloured page in the ballot book that will be used;
  - Collect the ballots;
  - When all balloting is finished, you, your assistant and any candidate scrutineers should seek a quiet, relatively-secluded place (such as a corner of the room, a hallway, or another room) and begin the count of ballots for each contested position;
  - A candidate needs to receive a clear majority of votes cast in order to win. If a first ballot results in no candidate receiving a majority, the candidate receiving the fewest number of votes is dropped and another round of balloting is held for that position. This procedure is continued until a candidate ultimately obtains a majority of votes;
  - When the election is complete, ask for a motion to destroy the ballots from the voters present. The motion must be seconded and approved;
  - Administer the Oath of Office as found in the YEU By-Laws book to the group of successful candidates.

All elected Local officers shall take office at the end of the meeting.

Thank all concerned for their contribution to rank-and-file control of our union and adjourn the meeting.

All elected officials must complete an Oath or Office, Confidentiality and Contact Information forms. The YEU officer in attendance will witness and sign them and submit all forms to YEU Membership.