

SASKATCHEWAN UNION OF NURSES



LOCAL EXECUTIVE TOOL KIT

Reviewed September 2020

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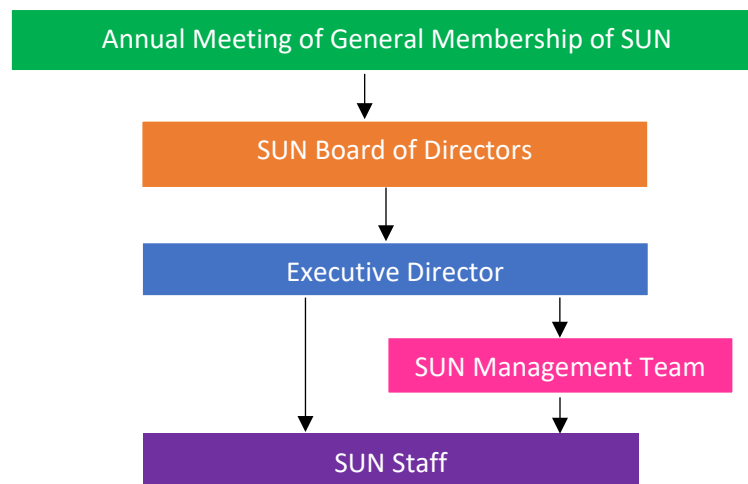
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Member Driven, Member Focused

At the foundation of SUN are the members – registered nurses, registered psychiatric nurses and nurse practitioners employed in a variety of settings throughout the province. As the governing body of the Union, each year at the Annual Meeting, members establish all policies, rules and regulations that bind members, Chartered Locals, Committees, and Directors of the Union. It is the input given during the Annual Meeting which provides the Board of Directors and staff with the direction required to implement the strategic focus of the Union for the following year.

Each year, during a Local Annual Meeting, the members elect their Local Executive, as well as establish the governing bylaws and policies for their Local. The Local Executive plays a vital role as the first point of contact for members when they have questions or concerns or require support in addressing professional or workplace issues.

SUN Organizational Chart



Defining the Roles of Leaders

At the core of SUN's strength is our elected leadership – it is their compassion for others, the dedication to protecting the professional and workplace rights of the members, and their commitment to ensuring the safety of patients, that makes our union strong.

How do we make our union stronger? We unite, and we conquer.

At each level of leadership, we each take on key components of providing member and union support and guidance. But with so many moving parts, it can be difficult to know whose job it is to take on which role. The following is a brief overview of key roles Locals, the Board of Directors and SUN Staff play in addressing member concerns.

Local Executive

- Welcomes new members into SUN.
- Administers the affairs of the Locals.
- First point of contact for member concerns.
- Conducts investigation into concerns raised by members.
- Conducts initial, informal meetings with Employer to resolve issues.
- Works with SUN Staff to escalate member concerns at appropriate stages.

Board of Directors

- Responsible for the governance and finances of the Union.
- Sets the strategic direction of the Union on an annual basis.
- Sets key bargaining priorities for contract negotiations.
- Provides support and guidance to Locals regarding day-to-day functions of the Local.
- Maintains communication with the Locals to whom they represent.

SUN Staff

- Provides guidance to Locals regarding nursing concerns and day-to-day functions of the Local.
- Supports Locals in escalating members concerns at the appropriate stages.
- Represents and protects the best interests and rights of members, with the Employer, at the appropriate stages.

Locals: Protecting the Interests & Rights of Members

Local Executive

The primary role of the Local is to provide member support, the Local Executive is also charged with the authority to administer the affairs of the Local and establish policies regarding the administration of the Local (as per Local Bylaws and the SUN Constitution and Bylaws). In addition, the Local is the first point of contact and support for their members.

The composition of each Local Executive is outlined in the Local Bylaws (Local Bylaw 6.01). Typically, executive roles include President, Vice-President, Local SUN District Council (SDC) representative(s), Treasurer, Secretary, and other committee chairs as required for the Local. In addition, depending on the structure of your Local, the NAC Chairperson and OH&S representatives may also be considered active members of your Local Executive.

In smaller locals, it is common for roles to be combined such as a secretary-treasurer or president and NAC chairperson. **NOTE:** *The role of President and Treasurer, as per Canadian Revenue Agency (CRA) regulations, cannot not be combined.*

The following is a guideline for determining the primary role of each position.

President

- Chairs all meetings of the Local, enforces SUN's Constitution, Provincial and Local Bylaws, and policies, rules and regulations enacted by the union and the local. (See Appendix V)
- Primary role is to provide members with advice about workplace issues and problems, to represent members' best interests when meeting with the Employer, and to supply information and answer questions about SUN.
- Responsible for conducting the initial investigation regarding member concerns/issues, and/or referring and escalating labour relations and practice concerns to SUN staff as appropriate for support and guidance.
- Actively participates in low level resolution meetings to address member concerns.
- Link between SUN Provincial and members in the local.

Vice President

- Assists the President in carrying out her duties and performs them in her absence.

Treasurer

- Responsible for all the financial affairs of the local, which includes ensuring the Local has a bank account, depositing cheques, ensuring proper signing authority is in place, payment of approved bills, and recording all transactions.
- Provide financial reports at all local meetings.
- Maintain financial records for seven years.
- Track and submit local and provincial forms (union leaves, expense claim forms, etc).

Secretary

- Creates agendas in concert with the Local Executive. See Appendix V for tips on creating an effective agenda.
- Keeps minutes of all meetings of the Local. See Appendix V for components of effective minutes.
- Handles the correspondence of the president and executive, keeps the locals mailing list up to date and maintains contact with the SUN offices.
- Submits Local Bylaws to SUN Provincial.

Local SDC Representative

- Attends regional SDC meetings.
- Establishes and maintains communication between local and regional SDC.
- Represents local member concerns at regional SDC meetings.

Depending on your Local structure, the following positions are not necessarily members of the Local Executive; however, play key roles in protecting the interests and rights of members.

NAC Chairperson

- Actively participates in low level resolution meetings to address professional practice concerns.
- Actively participates in initial NAC meetings with the Employer.
- Upon receipt of WSRs from members:
 - investigates the WSRs,
 - ensures the employer has received a copy, and
 - submits a copy to SUN Provincial,
 - coordinates a NAC meeting,
 - ensures minutes are taken and submitted to SUN Provincial and
 - maintains a record of the disposition of the WSRs.
- Collaborates with SUN Provincial in the escalation of WSRs via NAC Process within the Collective Agreement.

Occupational Health and Safety (OH&S) Chairperson

- Represents nursing at facility OH&S meetings.
- Participates in regional OH&S committees.
- Identifies and controls safety hazards.
- Communicates OH&S concerns raised at the Local to SUN Provincial.
- Participates in facility OH&S investigations.
- Promotes OH&S education and knowledge in the workplace.
- Maintains OH&S records and meeting minutes.

TIP: When Your Local Executive Changes

Whether it be following an election or when someone vacates a position, you are obligated to advise the following groups of changes to the Local Executive:

- Your members
- Your Employer
- Your bank to update/change the signing authorities for the local finances
- SUN Provincial – visit the LEADERSHIP section of the SUN website for a handy online form

Executive Duties

Within the role of the Local Executive there are a number of duties. To work effectively and efficiently, a Local Executive should divide the duties amongst their elected members, where appropriate. The following is a list of duties the Local Executive is responsible for:

- **Member Support**
 - Welcome new members.
 - Escalate member concerns as appropriate.
 - Listen to member concerns.
 - Initial meetings with management.
 - Initial grievance investigations.
 - Directs members with benefits, Long Term Disability (LTD), or WCB claims/forms to contact SUN Provincial.
- **Administration**
 - Review membership lists with SUN Provincial.
 - Update local executive changes with SUN Provincial and Employer.
 - Submit Local Bylaws annually to SUN Provincial.
 - Take local meeting minutes.
 - Ensure local election happens annually and follows process outlined in local Bylaws.
 - Track and maintain records for local union leave forms and expense forms.
 - Track and maintain records for provincial union leave forms and expense forms and submit to the provincial office.
 - Authorize local union leaves.
 - Conduct frequent audits of local dues reports from Employer.
- **Finances**
 - Maintain local financial records.
 - Conduct a yearly audit of the local's financial records.
- **Communication**
 - Notify members of upcoming meetings and/or elections.
 - Notify members of upcoming employer meetings.
 - Provide members with agenda for upcoming meetings.
 - Communicate employer information with members.
- Communicate concerns/issues to other levels of union.
- Share provincial communication with members.
- Meet with local members to discuss resolutions submitted to Provincial Annual Meeting.
- Share local concerns with SDC/BOD/Staff as appropriate.
- **Contract Compliance/Labour Relations**
 - Ensure contract compliance in workplace.
 - Review changes to employer policies for appropriateness.
 - Review new employer policies for appropriateness.
 - Review posting notifications for appropriateness.
 - Review successful applicant notifications for appropriateness.
 - Communicate posting concerns to SUN Provincial.
 - Communicate technological changes to SUN Provincial.
 - Communicate return for service agreements to SUN Provincial.
 - Communicate layoff notices to SUN Provincial.
 - Maintain records of consecutive weekend waivers.
 - Maintain records of standby waiver.
- **Nursing Advisory Process**
 - Submit WSRs to SUN Provincial.
 - Submit NAC meeting minutes to SUN Provincial.
 - Track and maintain records for WSRs filed, including meeting minutes.
 - Initial Nursing Advisory Meetings.
 - Escalate WSRs via NAC process.
- **OH&S**
 - Maintain OH&S records and meeting minutes.

Welcoming New Members

Part of your role of the Local Executive will be to provide new hires with an orientation to the Local and to SUN.

As per the Collective Agreement (see Union Recognition and Security), a representative of the Union shall be given thirty (30) minutes from her regular shift of duty without loss of pay or benefits to introduce the Union to the new Employee. Your orientation should be specific to your workplace and the processes your local has in place.

A few examples of topics to go over during the orientation session, include:

- **Who we are**
 - Introduce them to the local and your role
 - Share who SUN represents, SUN's mission, vision and values, the role of SUN Provincial and the services SUN provides.
- **Where to turn if they have questions**
 - Don't forget you are their first point of contact and support within the Union.
 - SUN Provincial also provides an on-call Employment Relations Officer (ERO) to assist members with questions regarding their workplace or collective agreement.
- **What to do if they have professional practice or workplace concerns**
 - Who should they talk to and what is the appropriate process to follow.
- **Right to union representation**
 - Let members know, if they are called into a meeting with the Employer, they do not have to attend that meeting alone. To ensure their rights under the collective agreement are protected, they have the right to have Union representation present.
- **Educational opportunities**
 - Include both opportunities provided by SUN Provincial and your local
- **Staying connected**
 - Remind members the best way to learn more about their local and their Union is to stay informed – read their emails, follow SUN and your local (if applicable) on social media, attend events and local meetings, and ask questions.
 - Advise the member it is their responsibility to keep their contact information – mailing address, phone number and email – as well as employment information, up-to-date with SUN Provincial.
- **Provide handouts**
 - List of Local Executive and contact information for SUN provincial
 - It is recommended you provide a Welcome Letter outlining everything you introduced them to during your orientation.
 - Your Union & You brochure (available from SUN Provincial)
 - Fast Facts for New Graduates (available from SUN Provincial)
 - How to Complete a WSR brochure (available from SUN Provincial)

MEMBERSHIP APPLICATION FORMS

As per the Collective Agreement, it is the **Employer's responsibility** to have all new SUN hires for the facility, sign a Union dues "Authorization for Check-Off" form as well as their applications for SUN Membership form at the time of hiring.

A copy of the form shall be provided to the member, Employer, Local and SUN Provincial. A delay in submitting these forms, creates a delay in the member being recorded in SUN's database.

Addressing Member Concerns

From time to time, members will raise questions, concerns and/or complaints regarding the workplace, professional practice and/or their rights under the Collective Agreement. As the Local Executive, your job is to investigate, assess and determine the best course of action to address the issue raised.

Not every issue raised will be a violation of the members rights, the Collective Agreement or professional practice standards; deciphering a complaint from a violation can be difficult. No matter the case, the first step is to listen to the members concerns and conduct a fact-finding investigation into the issue raised, to determine the best course of action taken.

At the local level, you are responsible for conducting the initial investigation of the issue(s) as well as any informal meetings with the Employer as per the Collective Agreement. Following your initial investigation, you should have the information required to make the appropriate assessment of the matter and advise the member of the next steps accordingly.

If your investigation determines a violation of the member's rights has occurred, there are two courses of action the Union can take to address the issue:

- (1) Grievance process to address contract or labour relations concerns
- (2) Nursing Advisory (NAC) process to address professional practice concerns

The following section provide you with an overview of the process, as well as the role and duties of the Local in assessing and addressing member concerns.

What Is A Grievance?

As defined within the Collective Agreement, *a grievance is defined as any difference between the persons or parties:*

- a) bound by the Collective Agreement, or*
- b) on whose behalf it was entered into concerning its interpretation, application or operation of any alleged violation thereof, including any questions as to whether the differences are arbitrable without stoppage of work or refusal to perform work.*

What Is An Arbitration?

An arbitration is the method of settling disputes through the intervention of a third party whose decision is final and binding. Arbitration is often used to settle major grievances and for settling contract interpretation disputes.

To determine if a grievance should proceed to arbitration, SUN's legal team conducts a review of the case, to assess the (on a case-by-case basis):

- Evidence and merits of the case.
- Rate of success at arbitration.
- Financial implications.
- Overall impact on organization/membership.

Should the review of the file determine the grievance should not proceed to arbitration, as per the Membership Policy 008-M-2007, the member reserves the right to appeal the decision.

What Is Duty of Fair Representation?

Under the *Saskatchewan Employment Act*, unions – including all locals, directors and staff – are required to fairly represent current and former employees in the employer-union relationship.

A Union, in any capacity, shall not act in a manner that is arbitrary, discriminatory or in bad faith in considering whether to represent or in representing an employee or former employee.

Addressing Member Concerns:

A SUN Member Calls With A Problem – What Do You Do?

STEP 1: Document The Issue

During your conversation with the member, document your discussion using the Member Issues Form. On the form you will also want to document any additional information required to assist you in assessing the issue and determining the best course of action for the issue. Information you collect should include:

- Name, phone number and email address of the member reporting the problem/issue.
- Facility/agency and unit (if applicable)
- Date and time the member contact you
- Description of the issue at hand
 - Include as many details concerning the issue as possible, including the date and time of the incident in question

Looking Ahead: The Member Issues Form will be your Local's official record of the issue raised, action taken to resolve the issue at the local level, and the outcome of those actions (resolved or unresolved and deferred to SUN Provincial and/or formal process).

TIPS FOR LISTENING TO & RECEIVING MEMBER CONCERNS:

- Remind members of their obligations as they relate to HIPA.
- Avoid distractions (cell phone, busy location, rushed for time, etc).
- If possible, find a private and comfortable location to have the conversation.
- Remain engaged and unbiased in the conversation. Try not to personalize the issue or provide personal input – this may cloud your assessment of the issue.
- Take detailed notes and seek clarification of the facts concerning the issue; ask the member to state what they know to be true, not their perception of the matter.
- Clarify what actions/steps the member took prior to raising the issue with the local
- Has this issue been raised before (JUMM, NAC process, etc)?
- Are there other factors influencing the situation?
- What remedy is the member seeking to resolve the matter (if appropriate)?
- Advise member of your next steps – investigation and assessment; if violation has occurred, informal meeting with employer to resolve the issue (if appropriate).

NOTE

In the event a member has been terminated, the issue/file should **immediately be referred to SUN Provincial** and entered into the grievance process at Step 2.

STEP 2: Identifying The Issue: Labour Relations vs Professional Practice

Following your conversation with the member, you should be able to determine if the issue is related to labour relations or professional practice.

Labour Relations issues are formally addressed through the grievance process and identified as situations related to:

- Breach of Collective Agreement.
- Violation of member's rights.
- Breach or change in application of Employer policy/procedure.

Professional Practice issues are formally addressed through the Joint Nursing Advisory (NAC) process, and are identified as situations related to:

- Nursing practice concerns.
- Safety of patients and registered nurses.
- Workload/staffing levels/patient acuity.
- Other factors which negatively affect patient care.

If the concern has been identified as a Labour Relations issue, proceed with investigating the facts of the issue raised (step 3).

If the concern has been identified as a professional practice issue, the member should be advised to complete a Work Situation Report (WSR) form and refer the matter to your Local NAC to follow through with the formal process outlined in the Collective Agreement and Joint NAC Manual.

A copy of the Joint NAC Manual is available for download from the professional practice section of the SUN website or may be requested from SUN Provincial.

STEP 3: Collecting The Facts

Now that you have determined the matter raised is a labour relations issues, you will need to conduct a thorough investigation to determine the facts of the matter. This evidence will assist you in assessing the issue raised and determining the best course of action.

- During the initial fact finding stage, the information listed below should be collected. This is not an exhaustive list, nor would every item apply to every scenario.
- To assist you in your investigation, a collection form has been developed for your use (Labour Relations (LR) Fact Sheet - Appendix III).
- To support locals in escalating concerns, and ensure the appropriate resources are available to SUN Staff to support the local/member accordingly, it is important to collect as much pertinent information as possible to properly assess the situation.
- **IMPORTANT:** Do not include patient specific information – HIPA must be maintained.

Information to collect during initial investigation:

- Name of members involved
- Contact information
- Member status
- Worksite or unit
- Issue presented/identified
- Date, time and shift affected
- Management representatives involved
- Meetings conducted to date
- Meeting minutes (JUMM/NAC)
- Policies
- Past practices
- Patient impact
- Breach of standards, etc
- Personnel file information
- Relevant forms (leave requests, overtime request forms, WSRs, etc.)
- Relevant documentation (emails, communication book, etc.)
- Job postings, notification of successful applicant, letters of appointment
- Rotations
- Seniority lists
- Portability of benefits
- Casual call-in logs
- Shift information such as notice of shift cancelation, scheduling of shift
- Evidence corroborating members concerns
- Witness investigation interview notes
- Relevant previously settled disputes/WSRs
- Payroll records (paystubs, leave forms, etc.)
- Resolution sought by member

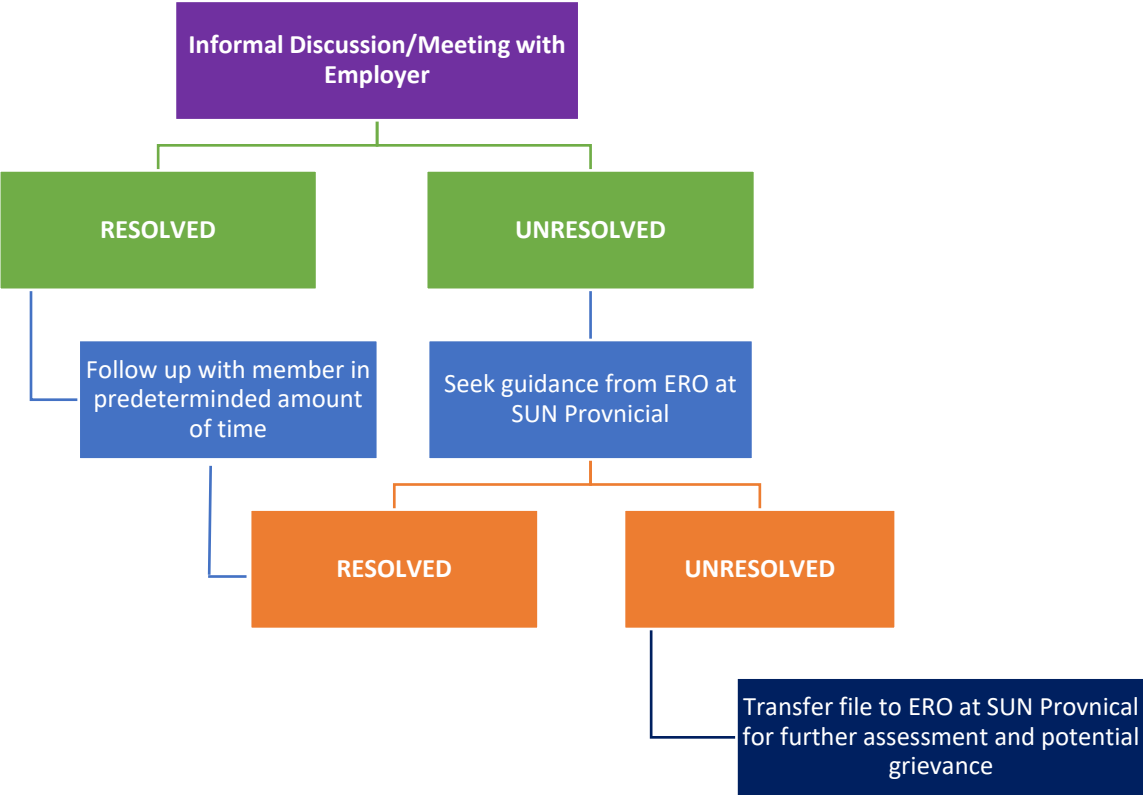
STEP 4: Informal Discussions and/or Meetings With Employer

When an issue is raised, the goal is to find low-level resolution to address the concern without requiring a formal and confrontational process. This can be achieved through collaborative, informal discussions with the Employer.

TIPS FOR MEETING WITH THE EMPLOYER:

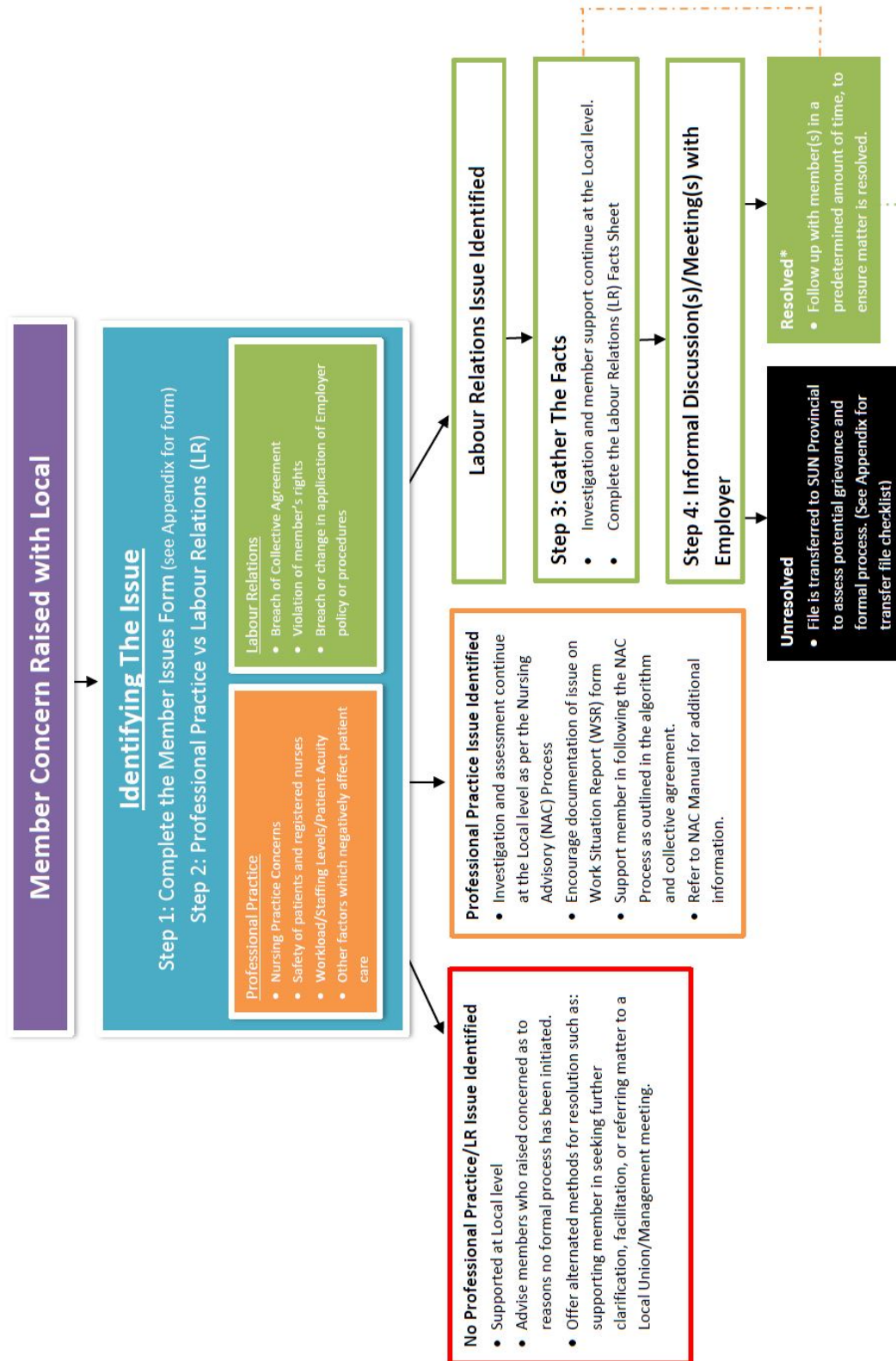
- Stay calm.
- Take notes during the conversation.
- Identify the facts of the situation as determined by your investigation.
- Listen to the Employer’s position, ask questions to seek clarification as needed,
- If necessary, caucus with your member(s) to discuss the Employer’s position and/or possible resolution.
- Remember: you do not have to agree to anything presented during the meeting. You can reserve the right to step away from the meeting and respond later. This provides you with the opportunity to seek guidance from your ERO at SUN Provincial, if necessary.

Pathway to Potential Resolution



Addressing Member Concerns:

Flow Chart for Labour Relations Issues

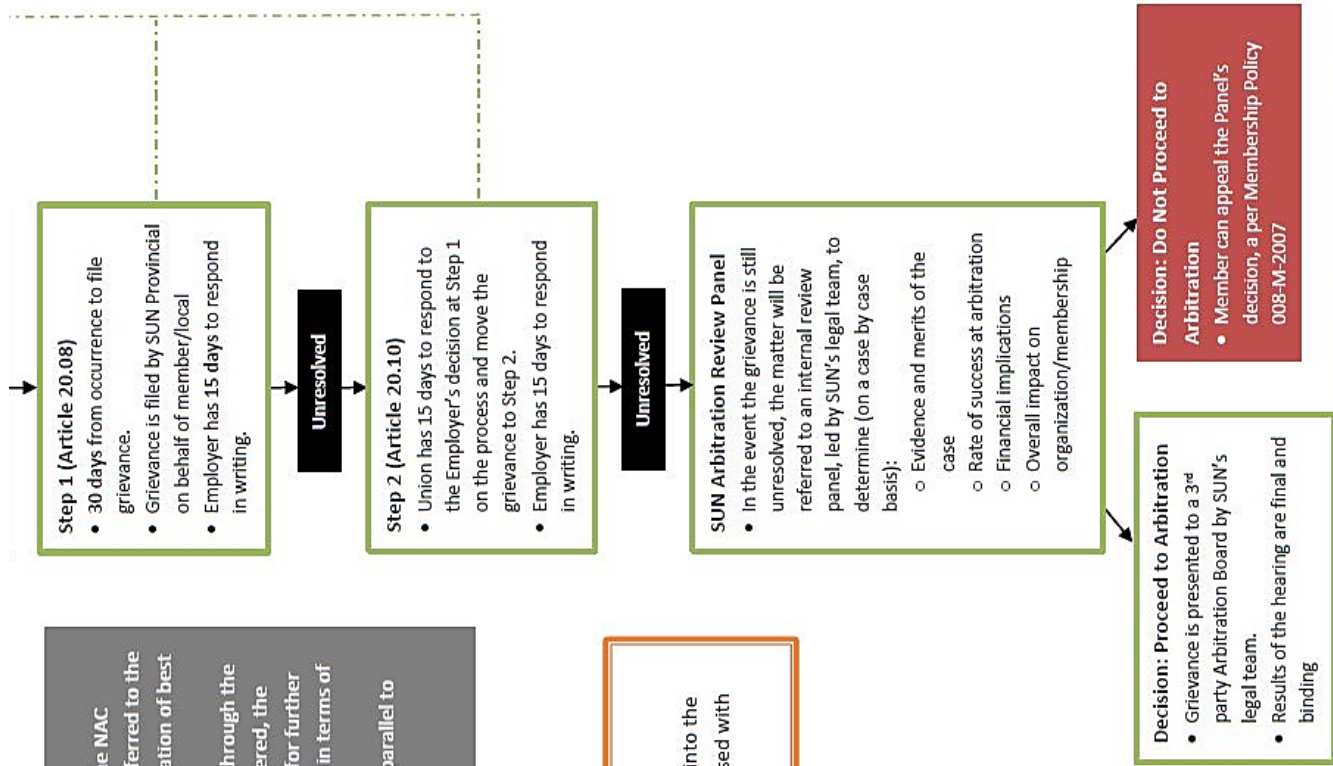


PARALLEL COURSE OF ACTION

- If at any point during investigation of an issue through the NAC process, a LR issue is discovered, the LR component is referred to the assessment stage for further investigation and determination of best course of action in terms of the grievance process.
- Similarly, if at any point during investigation of an issue through the grievance process, a professional practice issue is discovered, the practice component is referred to the assessment stage for further investigation and determination of best course of action in terms of the NAC process.
- When required, the NAC and grievance process will run parallel to resolve the issue.

*FOLLOWING UP ON RESOLVED ISSUES

- If the issue has not been resolved, further investigation into the matter (Step 3) should be conducted and once again raised with the Employer (Step 4).



Transferring A File To SUN Provincial

While representing members and working to resolve concerns, the duties, roles or abilities of the Local Executive may be exceeded. It is at such time the file would be transferred to the appropriate staff at SUN Provincial.

The following list has been developed to assist locals in transferring a member issues file to SUN Provincial. (See Appendix IV for the Labour Relations File Transfer memo).

Transferring Labour Relations Issue Files – Provide all pertinent information available including, but not limited to, the following:

- Member Issues Form
- Member Meeting notes
- Employer Meeting notes
- Local Meeting minutes
- Policies
- Personnel file information
- Rotations
- Postings
- Seniority lists
- Casual call-in logs
- Witness investigation interview notes
- Employer documents
- Relevant previously settled disputes
- Professional association communication
- Incident reporting forms, work situation reports
- Other relevant legislation or statutes
- Any other relevant information gathered through Local investigation

Representing Members During Discipline or Professional Conduct

There may be a time during in the provision of your work as a Local leader you are required to meet with the Employer on behalf of an individual member in relation to discipline or professional conduct. The following guide can be applied as required.

IMPORTANT: Any and all meetings with the Employer should be documented.

If you do not feel you can provide adequate representation for your member during such meeting, contact your ERO at SUN Provincial for assistance.

- It is the Employer's responsibility to identify to the Employee they are required to attend a meeting (Article 25.03(a)) and that Union representation shall be present (Article 25.03 (b)).
- When a member requests or requires your support in a meeting with the Employer, it is important to meet with the member in advance to:
 - Determine if the member has been notified of the reason for the meeting (Article 25.02(a)).
 - Determine the facts and circumstances regarding the situation.
 - Draft sample questions in preparation for the meeting.
 - If the member is aware of the reason for the meeting, collect and document the relevant information.
 - If the member is unaware of the circumstance, advise the member you will request the Employer provide all information related to the content at the outset of the meeting - including any written or verbal complaints, incident reports or other evidence.
- Bring copies of any supporting documents to be discussed such as Employer policies, communication, regulatory body documents, best practice guidelines, schedules, etc.
- If the Employer identifies specific relevant documents but does not provide copies during the meeting, request they provide copies after the meeting.
- Advise the member if at any time they require a caucus with you, they may request one.
- If you feel a caucus is required to ensure you and the member share the same understanding or remain focused, advise the Employer of this need. They may also request one for themselves during the meeting.
- Ask questions when you see inconsistencies in the Employer's arguments. Request further clarification if their answers are evasive or don't hold up to the evidence.
- After the employer has provided all relevant information, call for a caucus with the member.
- If upon receipt of meeting content information from the Employer, and you feel **unable to adequately represent** or advise the member, inform the Employer you will seek further council from SUN Provincial and arrange a meeting with the Employer within 15 days.
- If you feel **competent** to adequately represent or advise the member, record the discussion from the meeting and instruct the member to respond to the Employer's questions.

If resolution is mutually agreeable to by the member and the Employer, there is no further action required.

If resolution has not been achieved or discipline is anticipated, gather required information following the guide presented within the Labour Relations (LR) Fact Sheet and forward to the assigned ERO.

If discipline is imposed at conclusion of the meeting by the Employer, accept the discipline, gather the required information the Labour Relations (LR) Fact Sheet and **immediately forward to the assigned ERO.**

Joint Union Management Meetings

At the request of either the Local/Union or the Employer, a joint committee meeting shall be set up to deal with matters of mutual concern.

TIPS FOR CONDUCTING A JOINT UNION MANAGEMENT MEETING (JUMM):

- Collect discussion items from all attendees.
- Prepare and circulate agenda seven (7) days in advance of the meeting.
- The Local and the Employer should alternate the responsibility of chairing the meeting and taking meeting minutes.
- Review appropriate materials, resources, policies, etc. ahead of the JUMM.
- Promote and expect professionalism from all parties participating in meeting discussion.
- Establish follow-up meetings if necessary to review any action items identified.
- Circulate meeting minutes within a reasonable time frame to all attendees.

APPENDIX

Appendix I - Member Issues Form



Member Issues Form

Local # _____ Facility/Agency _____ Unit/Ward _____

Member Reporting Issue

Name *Email* *Phone* *Status (PFT, TPT, etc)*

Description of the Issue Raised - Capture as many details as possible including date and time of incident

Reported to:

Print name *Signature* *Date* *Position*

Actions Taken

☐ **RESOLVED** – Provide details of resolution below

Print Name *Signature* *Date* *Position*

☐ **UNRESOLVED Practice Issue**

Referred to NAC Process on: _____

☐ **UNRESOLVED LR Issue**

Referred to ERO/SUN Provincial on: _____

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DOWNLOAD AVAILABLE

Visit the LEADSERHIP section of the website to print copies of the Member Issues Form.

Appendix II – Fact Finding: Tips for Talking with Members

If the speaker is a “Compulsive Talker”: You will need to phrase your questions in such a way that will limit the range of responses. Avoid questions that allow the speaker to launch in a lengthy monologue – in this case, use close ended questions. There may be a time when you ask the speaker to refocus their attention on the main issue – a good way to do this without alienating them in the process is to say “That’s very interesting and I would like to hear more about it if time permits, yet there are points we need to cover if we’re both to profit from our interview. Do you mind if we come back to this and move into the area of ____?”

What about the non-talker? Use open ended questions and short probes such as “tell me more,” “Oh?” “Could you clarify this for me?” “I’m not sure I follow you there.” “That’s interesting – what makes you feel that way?” Non-talkers may be lacking confidence or experiencing anxiety. If you detect this in the early stages of the interview, spend more time on rapport building. Stories about similar experiences or backgrounds between the two of you may help. If you detect nervousness, start your interview with relatively easy questions.

If the person is hostile:

- Your initial response to anger should be one of calm neutrality yet sincere interest.
- Allow the person to speak, register a complaint, etc. uninterrupted.
- Follow up by repeating the facts as you heard them, asking for clarification and probing.
- After you have listened to the facts, do not be afraid to confront the viewpoints if they are founded on incomplete or distorted information.
- Remember, the anger may be directed at you or at someone else. If the anger is directed at you, avoid becoming defensive. After the person has calmed down, strive to understand the nature of the anger or complaint – restate to get clarification.
- If the anger is focused towards you, you may be able to either:
 1. See his/her point of view and rectify your own behavior, or,
 2. Provide him/her with your own interpretation and intent of the behavior.
- Help the person to see the conflict is not between the two of you, but rather between two points of view regarding a specific action or behavior. An area of objectivity may develop where actions are divorced from personalities. Rational discussion can then replace the emotional exchange.
- If the grievor’s anger is directed at someone else, remain calm and probe for understanding and clarity. The greatest pitfall during this kind of interview is to “line up” on the side of the person to whom the anger is directed, especially if the anger is directed at a fellow union member.

If, during your conversation, you both agree on the interpretation of the events, determine what you believe should be done about the problem in the short- and long-term. Determine next steps and how you plan to address or escalate the situation.

Appendix III – Labour Relations (LR) Fact Sheet



Local Labour Relations Fact Sheet

Local Information

Facility/Agency Name _____ Date: _____
Prepared By _____ Local # _____
Contact Information Phone # _____ Position _____
Email _____

Member Information

Name (Last, First) _____ Phone _____
Address _____ Email _____
Status (FT, PT, Cas, etc) _____ Unit _____

Out-of-Scope Manager/Supervisor

Name (Last, First) _____ Designation _____
Title _____ Phone _____
Email _____

Witness(es)

Name (Last, First)	Designation	Phone	Email
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

Facts of the Issues

Violation

- | | |
|--|---|
| <input type="checkbox"/> Breach of Collective Agreement
Article(s) _____ | <input type="checkbox"/> Violation of member rights |
| <input type="checkbox"/> Breach or change in application of Employer
policy/procedure | <input type="checkbox"/> Other: _____ |

Informal Discussion/Meeting

Date _____ Time _____

Attendees _____

Method ☐ Phone call ☐ Face-to-face**Notes**

Resolution (if reached)**Local Representative** *(if in attendance)*

Name (print) _____

Position _____

Signature _____

SUN Member *(if in attendance)*

Name (print) _____

Signature _____

Personnel File Review

Performance Expectation _____

Discipline Imposed _____

Date**Reason**

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APPENDIX IV - Labour Relations File Transfer Memo



LABOUR RELATIONS FILE TRANSFER

To: _____ **From:** _____
Local: _____ **Facility:** _____
Date Transferred: _____
Regarding: _____

This file contains the following information (only check those which apply):

- ☐ Copy of Member Issues Form
- ☐ Copy of Labour Relations (LR) Fact Sheet
- ☐ Meeting minutes and/or documentation from meeting
- ☐ Policies
- ☐ Personnel file information
- ☐ Rotations
- ☐ Postings
- ☐ Seniority lists
- ☐ Witness investigation interview notes
- ☐ Professional association communication
- ☐ Incident reporting forms, Work Situation Reports
- ☐ Other relevant documentation:
 - ☐ _____
 - ☐ _____
 - ☐ _____
 - ☐ _____

***If in doubt, send information to ERO for review

***Maintain HIPA – do not send patient identifying information

NOTE: Remember to keep a copy of all supporting information and/or documentation for the Local file.

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Visit the LEADSERHIP section of the website to print copies of the file transfer memo.

APPENDIX V - Local Membership Meetings

How often should your Local meet?

According to the (Local Bylaw 4.01), Locals must hold an annual meeting between September 1st and October 31st of each calendar year for the purpose of receiving the annual reports of the officers and committees for the previous business year, and transacting such other business as may be brought before it.. In accordance with (Local Bylaw 4.02), Locals shall hold a minimum of three (3) meetings per calendar year.

Chairing the meeting

The Local President chairs the meeting; the Local Secretary records the minutes. (If the Secretary is not available, have someone in attendance record the minutes.) The role of the Chair is not to do all the talking, but to ensure the discussion is on track and that everyone who wants to speak has a chance to do so. The Chair also ensures the minutes, motions and recommendations are recorded.

Some steps to follow when running a meeting:

1. Determine the purpose of the meeting.
2. Develop an agenda and post a meeting notice. The meeting notice should clearly state the date, time and location of the meeting. See page 24 for a sample agenda. (Local Bylaw 4.04) states that you must have the notice of meeting posted at least seven (7) days prior to the meeting. You can attach the agenda or indicate on the notice the purpose of the meeting. You may want to include an anticipated time of adjournment.
3. Arrive early and get yourself organized.
4. Start the meeting on time, by saying, "I call this meeting to order."
5. The other steps in a meeting can be:
6. Adoption of the agenda. This is a chance for others to add topics to the agenda. The Chair calls for a motion to accept the agenda as presented or as amended.
7. Reading and adoption of the minutes of the last meeting.
8. Ask if there are any errors or omissions. Again, the Chair calls for a motion to accept the minutes of the last meeting as read, circulated or as amended.
9. Treasurer's report and committee reports. It is not necessary to have a report from your Local committees at every meeting. The Treasurer's report usually follows the reading of the minutes and the committee reports would be given next. After each report is given, ask if there is any discussion. After the discussion, ask for a motion to accept the report as presented or amended.
10. Business arising from the minutes or old business is a continuation of business from previous meetings and minutes. Discussions relating to the outcome and progress of past meeting projects are given. Motions or recommendations providing direction are made and recorded in the minutes.
11. New business. This is where you bring up new issues. Motions and recommendations are made where necessary to ensure these issues are dealt with and brought forward and reported on at the next meeting.
12. Next meeting. Some Locals like to set the next meeting date, time and location before the current meeting adjourns.
13. Adjournment. It is a good practice to set an agreed-upon time to end the meeting. Adjourn at or before then. A motion is required to adjourn a meeting.

Creating an Agenda

An effective agenda sets clear expectations for what needs to occur before and during a meeting. It helps team members and management prepare, allocates time wisely, quickly gets everyone on the same topic, and identifies when the discussion is complete.

Components of an effective agenda:

- Meeting time and date
- Meeting location
- Local Name and Number, facility name
- Meeting participants
- Additions or deletions from agenda
- Approval of Agenda
- Additions or deletions from previous minutes
- Approval of previous minutes
- Materials required for review
- Old business
- New business
- Next meeting date

Taking Minutes

Minutes reflect the dialogue that occurred during a meeting and are a tool to ensure action items are followed up on. It is recommended meeting minutes follow the outline created by the agenda. It must be determined at the beginning of the meeting who is assuming responsibility to take and circulate official meeting minutes.

Verbatim documentation is required for recording motions or resolutions. The mover and seconder of any motions or resolutions must be recorded, as must the outcome of any vote.

Components of effective minutes

- Meeting time and date
- Time meeting called to order
- Meeting location
- Local Name and Number, facility name
- Meeting participants
- Additions or deletions from agenda
- Motion to adopt the agenda
- Additions or deletions from previous minutes
- Motion to adopt previous minutes
- Materials discussed
- Old business
- New business
- Any motions that result from discussion
- Action items and responsible party
- Next meeting date
- Time meeting adjourned

Rules of Order

- Local meetings are usually not as formal as larger SUN membership meetings. The following key points will help to ensure the meeting runs smoothly:
- An item is raised. Discussion takes place. A motion may be made. If a discussion does not require a motion, summarize what the members have agreed to regarding that particular issue. This provides a sense of completion for members and direction for the minutes.
- If a motion is made, it requires a mover and a seconder. The Chair then asks if there is any discussion on the motion. Once discussion ceases, the Chair conducts a vote.
- Majority rules. Votes are held by a show of hands unless members ask for a secret-ballot vote as would be the case when elections are being held.
- One purpose of membership meetings is to hear what members think. Give everyone ample opportunity to speak, no matter how unpopular their opinion may be.
- If one person is dominating the debate, you can request they wait until everyone else has had a chance to speak first. If it's a hot topic with several people trying to speak at once, start a speaker's list. Ask members to raise their hands if they want to speak. Write their names down as you see a hand raised, and call out the names one by one until everyone has spoken.
- Use common sense. If the meeting hits a snag, ask the group how it wants to proceed.

Robert's Rules of Order: Just the Basics

SUN Provincial uses Robert's Rules of Order when conducting formal meetings such as the Annual Meeting and Bargaining Conference. If your Local so chooses to do the same, we have included a brief overview to assist you during your meetings. Adapt as necessary for the size of your Local.

Basic Principles

- All members have equal rights, privileges and obligations.
- Full and free discussion of every motion is a basic right.
- Only one question at a time may be considered, and only one person may have the floor at any one time.
- Members have a right to know what the immediately pending question is and to have it restated before a vote is taken.
- No person can speak until recognized by the chair.
- Personal remarks are always out of order.
- A two-thirds vote is required for any motion that deprives a member of rights in any way (e.g., cutting off debate).

Role of the Presiding Officer (Chair)

- Remain impartial during debate — the presiding officer must relinquish the chair in order to debate the merits of a motion.
- Vote only to create or break a tie (or 2/3 for matters requiring a 2/3 vote) — exception: the presiding officer may vote on any vote by ballot.
- Introduce business in proper order.
- Recognize speakers.
- Determine if a motion is in order.
- Maintain order and keep discussion focused on the pending motion.
- Put motions to a vote and announce results.

General Procedure for Handling a Motion

- A member must obtain the floor by being recognized by the chair.
- Member makes a main motion. The motion must be seconded by another member before it can be considered. If the motion is in order, the chair will restate the motion and open debate (if the motion is debatable).
- The maker of a motion has the right to speak first in debate.
- The main motion is debated along with any Subsidiary motions (e.g. “I move to amend the motion by ...”, Privileged motions (e.g. “I move to postpone the motion to ...”) and Incidental motions (e.g. “I move to divide the question.”).
- Debate on Subsidiary, Privileged and Incidental motions (if debatable) takes precedence over debate on the main motion and must be decided before debate on the main motion can continue.
- Debate is closed when: Discussion has ended or two-thirds vote closes debate (“Call the question”).
- The chair restates the motion, and if necessary clarifies the consequences of affirmative and negative votes.
- The chair calls for a vote, by a show of hands, asking “All in favor?” “All opposed?” and finally asking “All abstained?”.
- The chair announces the result - carried or defeated.

General Rules of Debate

- No members may speak until recognized by the chair.
- All discussion must be relevant to the immediately pending question.
- No member can speak more than once to each motion — does not preclude points of information that may be raised.
- All remarks must be addressed to the chair — no cross debate is permitted.
- It is not permissible to speak against one’s own motion (but one can vote against one’s own motion).
- Debate must address issues not personalities — no one is permitted to make personal attacks or question the motives of other speakers.
- The presiding officer must relinquish the chair in order to participate in debate and cannot reassume the chair until the pending main question is disposed of.
- Members may not disrupt the assembly.
- Rules of debate can be changed by a two-thirds vote.



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