

UNA LOCAL ROLES & RESPONSIBILITIES



PREAMBLE

Subject to the UNA Constitution, Policies, Procedures, & applicable Collective Agreements, Locals retain discretion to determine who will perform specific roles & responsibilities. This document is to assist Locals in defining roles & assigning duties.

At least annually, Local Executives (with appropriate activists) will review & assign roles & responsibilities in a written document, understanding:

- › The work of the Local should be shared among all Local Executives & activists so everyone feels part of the team & so there is leadership development in the Local;
- › Locals rely to some degree on volunteerism to achieve their goals & fulfill their duties; &
- › It is a shared goal to have Local Executives & activists perform their roles confidently & collaboratively.

The Local Executive should review these roles with the appropriate Local activists. Duties may need to be performed more frequently depending on the size & activity level of the Local.

USE

Where a space is blank or fillable, the Local should determine who/ what position is assigned to oversee that responsibility.

GOVERNANCE

| ADMINISTRATION | POSITION | FREQUENCY |
|--|---------------------|---|
| REQUIRED | | |
| Review UNA Constitution, Policies, & Procedures while carrying out duties & performing tasks. | All | Ongoing |
| Propose amendments as appropriate to UNA Constitution & Policies. | All | Ongoing & prior to AGM |
| Build & strengthen relationships with the Executive Board & District Representatives. | All Local Executive | Ongoing |
| Check UNANet for emails, news, draws, info, etc. | All Local Executive | At least weekly |
| Attend applicable Provincial education. | All | Once per Exec |
| Coordinate a strategic planning meeting covering goal setting, membership engagement targets, roles & delegation, & budget planning, laying out the upcoming year. | | Annually Review & revise with new Exec |
| Share all relevant information from Provincial & District Meetings with the Local Exec & members. | | As needed |

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| Communicate with District Representative. | | Monthly |
| Attend all District Meetings. | President/Designate: | Quarterly |
| Confirm your Local's attendance at all District Meetings via the Data Management System (DMS). | President/Designate: | Quarterly |
| Ensure the Local protects personal information as per the UNA privacy policy. | All | Ongoing |
| Maintain Local records in accordance with Archiving Guidelines. | | Ongoing |
| Review & appropriately discard Local records if no longer needed. | | Annually |
| Reallocate funding if a Local Executive member who receives Local Funding is unable to carry out their duties & notify Centralized Accounting. | All Local Executive | As needed |
| Ensure voting delegates for Provincial meetings are in good standing. | | As needed |
| Hold a Local meeting prior to Provincial AGM to ensure members are informed of the meeting. | | Annually |
| Work with your LRO & District Representative if making recommendations for the allocation of your Local/dues payers. (Mergers & New Locals) | President/ Vice President | As needed |
| Coach incoming person as the last duty of office. | All | As needed |

RECOMMENDED

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| Attend Labour Council affiliate meetings. | | As scheduled |
| Be the Local contact for other worksite unions. | | As needed |

OPTIONAL

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| Attend Provincial Executive Board meetings. | | Quarterly |
| Hold a delegate & observer meeting prior to Provincial AGM. | | Annually |

| MEMBER SERVICES | POSITION | FREQUENCY |
|--|--|-------------------|
| REQUIRED | | |
| Ensure every Unit or Office has a UNA representative. | | Ongoing |
| Encourage duespayers to sign membership applications or apply through the website. | Unit/Office Reps <i>(recommended)</i> or _____ | Ongoing |
| Arrange location, date, & time with Employer for union orientation. | | As needed |
| Provide union orientation to new duespayers. | | Ongoing |
| Submit all signed paper applications for membership to UNA's Data Maintenance staff. | Secretary/Designate: _____ | As needed |
| Approve all electronic applications for membership in the Data Management System (DMS). | Secretary/Designate: _____ | As needed |
| Identify new duespayers & duespayers who are not members. (Provide info to Unit/Office Reps.) | | Ongoing |
| Review notice of changes in membership. | | Ongoing |
| Oversee Unit/Office Representative system (& communication). | Vice President <i>(recommended)</i> or _____ | Ongoing |
| Distribute union-generated documents (spotlights, joint statements, bargaining updates, etc.). | Unit/Office Reps <i>(recommended)</i> &/or _____ | Ongoing |
| Update duespayer information, including contact information. | | Ongoing |
| Update & maintain Local bulletin board(s). | | Ongoing/quarterly |
| Multi-bargaining unit Locals: ensure each bargaining unit has representation in the Local. | | As needed |
| RECOMMENDED | | |
| Update & maintain unit/office binders, if applicable. | Unit/Office Reps <i>(recommended)</i> or _____ | Ongoing/quarterly |
| Provide materials for unit/office binders, if applicable. | Vice President <i>(recommended)</i> or _____ | Ongoing |
| Take applicable workshops. | Unit/Office Reps <i>(recommended)</i> or _____ | Once per Rep |
| Encourage members to take applicable UNA workshops. | Unit/Office Reps <i>(recommended)</i> &/or _____ | Ongoing |
| Coordinate member engagement & outreach (coffee carts, events, etc.). | | Ongoing |
| Coordinate Nurses' Week activities. | | Annually |
| OPTIONAL | | |

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| Coordinate social events. | | As needed |
| Coordinate Local education. | | As needed |
| Create/maintain Local social media (website, Facebook, Twitter). | | As needed |

| FINANCE | POSITION | FREQUENCY |
|---|-----------------------|------------------------------|
| REQUIRED | | |
| Ensure Local income is utilized to uphold the Local's primary obligations under the Collective Agreement & to uphold UNA's objectives. | All | Ongoing |
| Prepare an annual Local budget as part of the Local's strategic planning meeting. | All | Annually |
| Enter the draft budget into the Data Management System (DMS). | Treasurer | Annually, prior to Local AGM |
| Present an annual Local budget for approval at a Local Annual General Meeting (meeting must occur prior to December 31st of each year). | Treasurer | Annually at Local AGM |
| Submit the approved budget via the Data Management System (DMS) by January 31st of the budget year. | Treasurer | Annually |
| Review & approve/reject expense claims except the Treasurer's. | Treasurer | Weekly/as needed |
| Review & approve/reject LOA requests except the Treasurer's. | Treasurer | Weekly/as needed |
| Review & approve/reject the Treasurer's expense claims. | | Weekly/as needed |
| Review & approve/reject the Treasurer's LOA requests. | | Weekly/as needed |
| Make payments using Accounts Payable. | Treasurer | As needed |
| Submit for audit Local financial records to UNA as requested. | Treasurer | As requested |
| Maintain Local financial records including receipts for 7 years plus the current year. | Treasurer | Ongoing |
| Review & appropriately discard Local financial records if no longer needed. | Treasurer & Secretary | Annually |
| Administrate the EI Fund (assign an EI Fund Administrator) according to UNA Procedures & Federal legislation (where applicable). | | Ongoing |
| Adopt the Provincial EI Fund policy or create an EI Fund policy (where applicable). | | Ongoing |
| In the event of a dues cessation, coordinate the collection of dues & applicable levies & forward the dues to UNA Provincial Office with duespayer lists. | Treasurer | As needed |
| Review all monthly financial statements for accuracy. | Treasurer | Monthly |
| Review all weekly payment reports for accuracy. | Treasurer | Weekly |
| Check the duespayer calculations for the previous 6 months that are posted in January & June of each year for accuracy. | Treasurer | January & June |
| Check the amount of the Local Dues Rebate for accuracy. | Treasurer | Monthly |

| LOCAL MEETINGS | POSITION | FREQUENCY |
|--|----------------------|-------------|
| REQUIRED | | |
| Ensure three Local meetings are scheduled per year. | President | Ongoing |
| Schedule a Local AGM once per year. | President | Annually |
| Provide notice of meetings, nominations, elections, & other Local events/activities. | | As needed |
| Gather nomination forms for Local positions & ensure nominated members are in good standing. | Secretary/Designate: | As needed |
| Invite your assigned District Representative to attend at least one Local meeting per year. | | Annually |
| Take minutes at Local Exec & Local membership meetings. | Secretary | As needed |
| Prepare meeting agendas. | | As needed |
| Maintain storage of Local meeting minutes. | Secretary | As needed |
| Maintain Bylaw changes document(s). | Secretary | As needed |
| Chair Local meetings & Local AGMs. | President | As needed |
| Coordinate logistics & supplies for meetings (space, food, documents, etc.). | Secretary | As needed |
| Require attendees at Local meetings to sign in with names & membership numbers. | Secretary | At meetings |
| Prepare & present minutes from the previous Local meeting/AGM for approval at a Local meeting. | Secretary | As needed |
| Make Local meeting minutes available to members. | Secretary | As needed |
| OPTIONAL | | |
| Coordinate education during or after meetings. | | As needed |
| Coordinate social events during or after meetings. | | As needed |

LABOUR RELATIONS

| COLLECTIVE AGREEMENT | POSITION | FREQUENCY |
|---|------------------------------------|-----------|
| REQUIRED | | |
| Respond to duespayer inquiries & concerns. | | As needed |
| Check personal & Local email for urgent communication regarding collective agreement administration (duespayer concerns, LRO). | | Daily |
| Be the primary contact for the LRO. | | Ongoing |
| Identify potential Collective Agreement violations & communicate with the Local Executive. | Local Executive & Unit/Office Reps | Ongoing |
| Notify LRO of potential grievances. | | As needed |
| Encourage duespayers to have initial problem-solving conversations. | Local Executive & Unit/Office Reps | Ongoing |
| Assist duespayers with the Initial Problem-Solving step of the Dispute Resolution Process. | Local Executive | As needed |
| Represent duespayers at disciplinary investigation meetings (without the LRO). | | As needed |
| Represent duespayers at disciplinary outcome meetings (without the LRO). | | As needed |
| Attend grievance resolution meetings (LRO present). | | As needed |
| Attend DRAC, mediation, or arbitration (LRO present). | | As needed |
| Coordinate with LRO to arrange representation for duespayers at duty to accommodate meetings. | | As needed |
| Review schedules/rotations for contract compliance. | | As needed |
| Check job postings for contract compliance. | | Weekly |
| Review & assess duespayer requests to amend their seniority date. | | As needed |
| Waive postings to facilitate duty to accommodate placements & grievance resolutions. | | As needed |
| Ensure an RN/RPN is in charge of all units as required. | | As needed |
| Consult with an affected duespayer to determine whether the Local will agree to extend a temporary position pursuant to Article 14.02(e) (Provincial Collective Agreement). | | As needed |
| Upon receipt of an Employer request to extend disciplinary timelines, contact the duespayer (& LRO, where necessary) to obtain instructions. | | As needed |
| Upon receipt of an Employer request to extend the dispute process timelines, forward that request to the responsible LRO immediately. | | As needed |
| Follow the decision-making processes for mutual agreements between the Employer & the Local as set out in UNA Procedure – Mutual Agreements. | | As needed |

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| Review & update current Extended Workday list(s) & forward copies to the assigned LRO as needed. | | At least annually |
| Refer requests to permit an Employee to work on more than one unit to the assigned LRO as per UNA Procedure – Mutual Agreements. | | As needed |
| Forward all proposed Letters of Understanding to the Executive Officers & Director of Labour Relations for approval. | | As needed |
| Arrange & attend Labour Management Meetings with the Employer, as required by the Collective Agreement. | | As required |
| Prior to the Employer’s decision of a possible reduction in the workforce or position elimination, meet with the Employer to discuss the items listed in Article 15.01(a) of the Provincial Collective Agreement. | | As needed |
| Coordinate with LRO to meet or speak with every duespayer who receives layoff or position elimination notice. | | As needed |
| Monitor the layoff & recall process to ensure compliance with the Collective Agreement & contact LRO upon notice of possible reduction. | | As needed |
| Notify other Locals of the workforce reduction or position eliminations & the potential for displacement or selection of vacancies. | | As needed |

RECOMMENDED

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| Inform the Local if duespayers go off work on STD, LTD, WCB, or other leaves. | Unit/Office Reps <i>(recommended)</i> or _____ | Ongoing |
| Follow up with duespayers on LOAs. | | As needed |
| Assist duespayers in filling out PRC & OH&S report forms. | Unit/Office Reps <i>(recommended)</i> or _____ | Ongoing |

OH&S

POSITION

FREQUENCY

REQUIRED

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| Elect OH&S Committee representatives. | Local Members | Annually at Local AGM |
| Enter paper concern forms, review electronic concern forms, update, & close OH&S records in the Data Management System (DMS). | | Ongoing |
| Confirm the duespayer(s) had a discussion with the Manager & the outcome of that discussion. | | Ongoing |
| If the duespayer(s) was unable to have a discussion with their manager, assist with the discussion or have the discussion on their behalf. | | Ongoing |
| Follow up with the duespayer(s) who submitted the concern to obtain all information needed. | | Ongoing |

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| When a concern is reported/identified, determine if it is necessary for the committee to meet within ten days based on the urgency of the concern. | OH&S Committee (all) | Upon receipt of a concern |
| Prepare meeting agenda with Employer Co-Chair & send out 1 week in advance of meeting. | OH&S Co-Chair | Monthly |
| Hold regular committee meetings with the Employer to discuss concerns. | OH&S Committee | Monthly & as needed |
| Determine (with Employer Co-Chair) if any guests need to be invited to the next committee meeting. | OH&S Co-Chair | Monthly |
| Attend OH&S committee meetings. | OH&S Committee | Monthly |
| Chair OH&S meetings with Employer Co-Chair. | OH&S Co-Chair | Monthly |
| Prepare & review committee meeting minutes with the Employer. | | Monthly |
| Sign a copy of the approved minutes. | OH&S Co-Chair | Monthly |
| Ensure the Employer posts or provides the minutes electronically at each worksite within 7 days of the day the meeting occurred. | | Monthly |
| Make OH&S minutes available for members in your site(s)/program(s)/unit(s) to review. | | Monthly |
| Store OH&S minutes. (Can be stored in DMS.) | | Ongoing |
| Identify & request available & relevant information from the Employer. | | As needed |
| When the parties succeed in reaching a resolution, confirm the agreement in writing & determine implementation actions & a plan to monitor changes as applicable. | | As needed |
| Provide updates to & follow up with duespayers who submit concerns. | | Ongoing |
| If Employer is unable or unwilling to resolve a complaint, obtain their rationale in writing. | | As required |
| If a concern is not resolved at the Committee, refer the matter to the CEO/designate. | in conjunction with UNA's OH&S Officer | As needed & within timelines specified |
| If a concern is not satisfactorily resolved by the CEO/designate, discuss a potential escalation to the Board with UNA's OHS Officer. | in conjunction with UNA's OH&S Officer | As needed |
| Collaborate with UNA OHS Officer to develop & give a presentation to the Board. | in conjunction with UNA's OH&S Officer | As needed |
| Arrange, attend, & actively participate in worksite inspections. | OH&S Committee | Quarterly/prior to meetings |
| Ensure Hazard Identification & Control reports were developed with input from affected workers. | | As required |
| Review & update Hazard Reports as per Part 2 of the OH&S Code. | | As required |
| Review Employer OH&S policies & provide feedback as requested. | | As needed |

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| Review Employer working alone policy & procedures. | | Annually |
| Review Employer harassment policy & prevention plan. | | Annually & after incidents of harassment |
| Review Employer violence prevention plan, which includes policy & procedures. | | Annually & following a violent incident |
| Review Employer Zero Tolerance of Staff Abuse policy. | | Annually |
| Check to ensure signs supporting zero tolerance of violence are posted in all public areas. | | As needed |
| Review information relating to hazard assessments & provide input. | | As needed |
| Ensure Employer has implemented a Psychological Health & Safety Plan that is consistent with the current Psychological Safety in the Workplace Standard. | | As required |
| Take an active role in performing incident investigations. | OH&S Committee | As required |
| Ensure Employer consults with the Local prior to implementing a regularly scheduled shift that begins or ends between 2400 & 0600. | | As required |
| Ensure OH&S committee members are provided with Employer-paid time off (16 hours or the number of hours worked during 2 shifts) to attend OH&S education & training. | | Annually |

RECOMMENDED

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| Encourage OH&S committee members to attend the OH&S workshops. | OH&S Chair | As needed |
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OPTIONAL

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| Sit as an ex-officio member. | President | As needed |
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PRC

POSITION

FREQUENCY

REQUIRED

| | | |
|---|---------------|-----------------------|
| Elect PRC Committee (PRCC) representatives. | Local Members | Annually at Local AGM |
| Enter paper PRCFs, review electronic PRCFs, update, & close PRC records in the Data Management System (DMS). | | Ongoing |
| Confirm the duespayer(s) had the required discussion with the Manager & the outcome of that discussion. | | Ongoing |
| If the duespayer(s) was unable to have a discussion with their manager, assist with the discussion or have the discussion with the Manager on their behalf. | | Ongoing |
| Follow up with the duespayer(s) who submitted the PRCF to obtain all information needed to discuss the issue at the next PRCC meeting. | | Ongoing |
| Send PRCF to immediate Supervisor/Manager (if not already done by duespayer) & to Employer co-chair of PRCC. | | Ongoing |

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| Request a written response from the Manager prior to the next PRCC meeting using the PRC Response Form, if not already received. | | Ongoing |
| Prepare PRCC meeting agenda with Employer Co-Chair & arrange to send out 1 week in advance of meeting. | PRCC Co-Chair | Monthly |
| Determine with the Employer Co-Chair if any guests need to be invited to the next meeting. | PRCC Co-Chair | Monthly |
| Attend PRCC meetings. | PRCC Reps | Monthly |
| Chair PRCC meetings with Employer Co-Chair. | PRCC Co-Chair | Monthly |
| Prepare & review PRCC meeting minutes with the Employer. | PRCC Reps | Monthly |
| Store PRCC minutes. (Can be stored in DMS.) | | Ongoing |
| Identify & request available & relevant information from the Employer. | PRCC Reps | As needed |
| When the parties succeed in reaching a resolution, confirm the agreement in writing & determine implementation actions & a plan to monitor changes as applicable. | PRCC Reps | As needed |
| Provide updates to & follow up with duespayers who submit PRCFs. | PRCC Reps | Ongoing |
| If a concern is unresolved at the PRCC, then discuss the concern with the applicable senior leader (as determined by the Employer). | PRCC Reps in conjunction with PRC Advisor | As needed & within timelines specified |
| If a concern is not resolved after discussion with the applicable senior leader, then discuss escalation with a UNA PRC Advisor. | PRCC Reps in conjunction with PRC Advisor | As needed & within specified timelines |
| When escalating, prepare the necessary written background information at least one week in advance of the meeting. | PRCC Reps in conjunction with PRC Advisor | As needed |
| Provide education on the PRC process. | PRCC Reps/ PRC Advisor | As needed |
| Make paper PRCFs available for duespayers. | | Ongoing |
| Make PRCC minutes available for members in your site(s)/program(s)/unit(s) to review. | | Monthly |
| Ensure any duespayers attending PRCC meetings are paid by the Employer at straight time. | PRCC Co-Chair | Monthly |
| Ensure any duespayers attending CEO or Board meetings receive Provincial funding for travel & accommodation as per UNA policy. Salary replacement is the responsibility of the Local. | Local Exec/ PRCC Co-Chair | As needed |
| Ensure duespayers attending Voluntary Mediation/IAC meetings receive Provincial funding as per UNA policy. | Local Exec/ PRCC Co-Chair | As needed |

RECOMMENDED

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| Attend UNA PRC workshop(s). | All PRCC Reps | As needed |
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OPTIONAL

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| Consider participating in voluntary mediation of unresolved concerns at any step of the PRC process. | PRCC Reps/ PRC Advisor | As needed |
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| Determine the UNA mediation nominee. | PRCC Reps/ PRC Advisor | As needed |
| Sit as an ex-officio member. | President | As needed |

| ESSENTIAL SERVICES (not applicable to Agape) | POSITION | FREQUENCY |
|---|--|--------------|
| REQUIRED | | |
| Be a resource for ESA information. | Local Executives & Unit/Office Reps | As needed |
| Validate Employer information regarding current staffing levels. | Local Executives & Unit/Office Reps | As requested |
| Identify & clarify differences in Union & Employer understanding of current staffing levels. | | As needed |
| Review Employer-developed staffing plans & briefing notes (where available) regarding essential services. | | As needed |
| Develop Local proposals for essential services staffing levels. | | As needed |
| Input Local staffing proposals into the Data Management System (DMS). | | As needed |
| Negotiate Essential Services staffing levels with Employer representatives. | with assigned LRO & District Rep | As needed |
| Enter counter-proposals into the Data Management System (DMS). | | As needed |
| Notify Essential Services Task Force when Local & Employer have reached a tentative agreement at the Local level. | | As needed |
| Notify Essential Services Task Force of any outstanding disputes that arose during essential services negotiations. | | As needed |
| Establish a strike committee consistent with the UNA Strike Manual. | | As needed |
| In event of strike, designate staff to work hours prescribed by ESA. | | As needed |
| In event of strike, monitor Employer activities to ensure they comply with requirements of ESA & report breaches to the Task Force. | | As needed |
| In the event of a strike, staff an essential services on-site headquarters for the Local. | | As needed |
| In event of strike, arrange an off-site strike headquarters. | | As needed |

LOCAL AGREEMENT

Have each Local Executive member sign this page affirming they have reviewed the Local Roles & Responsibilities document, have participated in assigning roles to the Local Executive, & have agreed to assign roles as outlined by the Local in the document.

NAME

POSITION

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