

Bargaining Unit and Local Executive Accountabilities with Role Descriptions

Approved December 2017 Board of Directors Meeting



The Ontario Nurses' Association (ONA) is the Union representing 65,000 registered nurses and health-care professionals and more than 16,000 nursing students, providing care in hospitals, long-term care facilities, public health, the community, clinics and industry.

www.Facebook.com/OntarioNurses

www.Twitter.com/OntarioNurses

www.youtube.com/OntarioNurses

Table of Contents

	<u>Page</u>
INTRODUCTION	1
BARGAINING UNIT PRESIDENT	2
NEGOTIATIONS COMMITTEE.....	7
GRIEVANCE CHAIR.....	11
LABOUR-MANAGEMENT	15
UNIT REPRESENTATIVE.....	18
SITE REPRESENTATIVE AND/OR VICE-PRESIDENT.....	22
HEALTH AND SAFETY REPRESENTATIVES	24
SAFE RETURN TO WORK/WORK ACCOMMODATION REPRESENTATIVE	28
HUMAN RIGHTS AND EQUITY REPRESENTATIVE	32
POLITICAL ACTION	35
BENEFITS RESOURCE LEAD – LTD, STD, EXTENDED HEALTH CARE (EHC).....	38
WORKLOAD AND PROFESSIONAL RESPONSIBILITY REPRESENTATIVE	41
PROFESSIONAL DEVELOPMENT	43
LOCAL EXECUTIVE.....	46
LOCAL COORDINATOR	47
FIRST VICE COORDINATOR.....	50
TREASURER.....	51
SECRETARY	55

INTRODUCTION

The work of Bargaining Unit and Local Executive leadership is integral in providing service to our members. This document is intended as a resource tool to assist and support these leaders in their work and to meet their accountabilities. These accountabilities have been developed over time with both leader and with membership feedback.

A focus group of ONA members assisted in separating the following accountabilities into “tiers.” While all accountabilities are important, the focus group recognized that leaders can benefit by prioritizing their various accountabilities, with “Tier 1” accountabilities being considered the most important, “Tier 2” accountabilities being the second most important, and so on.

Support in understanding and meeting the various accountabilities is also available from ONA staff and elected Board representatives. It is recognized that there will be differences between multi-Bargaining Unit and single Bargaining Unit Locals, and between Bargaining Units of different sizes. Discussion should therefore be held at each Local/Bargaining Unit as to how the document can be best used to support the work of our Local/Bargaining Unit leaders.

For each representative/committee, a list of reference material has been added as the resources to support the role. ONA Educational Workshops are available to assist in supporting Bargaining Unit representatives with these accountabilities.

Elections to the positions outlined in this document are conducted in accordance with the ONA Constitution and policies.

BARGAINING UNIT PRESIDENT

PURPOSE:

The main duties of the Bargaining Unit President are: to coordinate and facilitate the functioning of the Bargaining Unit within the Constitution and ONA policies; to mentor and coach Bargaining Unit Representatives who are doing the work of the Bargaining Unit; and to ensure there is effective communication throughout the Bargaining Unit, Local and all levels of the organization.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. Provide leadership at the Bargaining Unit level and act as a resource to all Bargaining Unit Representatives.

- According to the Constitutional timelines for the Provincial Coordinators Meeting (PCM)/Area Coordinators Conference (ACC), pick Bargaining Unit/Local meeting dates for entire year – Bargaining Unit leadership team → Local Executive → ACC → PCM → Board of Directors.
- Hold a minimum of two Bargaining Unit meetings per year.
- Post names of Bargaining Unit leadership team and contact information at all sites/units/locations as able.
- Act as coach and mentor to your Bargaining Unit leadership team.
- Know where to get information, i.e. Service Delivery Manual, Policy Manual, ONA Constitution and collective agreement, Labour Relations Officer (LRO).
- Ensures that ONA and the Local Executive is updated on changes to the bargaining unit leadership team including contact information.

2. Ensure processes are in place to ensure the administration/enforcement of the collective agreement and human resources plans by members and employers.

- Know the central (if applicable) and Bargaining Unit collective agreements, arrange for distribution to members so they have a copy of current collective agreement.
- Review provincial labour relations directives and incorporate into committee agendas where applicable.
- Direct members to ONA website.
- Notify LRO of any changes to employer practices or policies.
- Develop a communication loop with all unit reps and all committee members i.e. one-on-one, e-scan, e-mail, fax, Bargaining Unit meetings. Bargaining Unit Leadership to develop what the role of the representatives and committee members is regarding communications.
- Routinely communicate with LRO – have facts, review issues, get direction and develop next steps and timelines.

- Utilize Labour-Management / Hospital-Association Committee (HAC) / Nurse Management liaisons to highlight issues.
 - Set agenda (and/or assist committee chairs) – based on issues from members/leaders.
 - Set meeting dates for all committees for the year if possible.
 - Communicate with employer managers, human resources, identify potential problems – know the employer’s position.
 - If you are a new Bargaining Unit President, you may want your LRO present at some meetings.
- 3. Delegate work to the appropriate person and encourage others to do the same. Monitor work of the committees and representatives of the Bargaining Unit.**
- Ensure committees are in place and reps are aware of job description and accountabilities – provide to them.
 - Elect or appoint as necessary as per Constitution and Collective Agreement.
 - Refer to ONA election guidelines and local policy.
 - Act as coach and mentor – Collective Agreement, Constitution, Service Delivery Manual.
- 4. Ensure processes are in place to actively seek feedback and incorporate that information into the decision-making process at the Bargaining Unit and Local level.**
- Collect/collate information from Bargaining Unit team → create an intake log → create action plan to address issues (utilize report backs; e-scans from → site reps; committee reps (as per policy); Occupational Health & Safety; Labour-Management; Human Rights & Equity; Professional Development and others).
 - Utilize report backs from all sources to develop strategies (in conjunction with bargaining leadership team and LRO) to address issues, e.g. what committee should you refer the issue to, the timelines for resolution of the issue (urgent, ongoing, etc).
- 5. Liaise with committee chairs of the Bargaining Unit committees and Bargaining Unit Representatives to assess membership’s needs and to communicate those needs to the Local executive.**
- Bargaining Unit President should be kept up to date on the work of the Bargaining Unit, including all committees.
 - Report back by e-scan to the Local Executive on Bargaining Unit work/issues/concerns.
 - Ensure minutes are kept for all committee meetings (see ONA Guide to Minutes, Motions and Meticulous Meetings).

- 6. On-going liaison with the District Service Teams.**
 - Set-up regular contact with LRO → monthly or as required (schedule annual calendar) → send copies of Labour-Management minutes → health & safety minutes → professional responsibility summary → professional responsibility workload reporting process and to staff where applicable.
- 7. Ensure timely effective dissemination of Provincial and Local information and initiatives throughout the Bargaining Unit and provide feedback to the Local Executive team.**
 - One-on-one with members, Bargaining Unit leadership team and Local Executive.
 - E-mail, fax, e-scan, newsletters.
 - Ensure current info is on ONA bulletin boards, e.g. delegate this role.
 - Be conscious of different celebratory weeks and access ONA website for info.
- 8. Serves as chair of Bargaining Unit committees as outlined in the constitution.**
 - Review constitution and collective agreement requirements.
- 9. Ensure processes are in place for the effective dissemination of information and learnings through out the Bargaining Unit, locally and provincially.**
 - Identify Bargaining Unit educational needs → Local Executive – prioritize education required.
 - Attend Joint Sector Meeting.
 - Ensure registration forms for education are submitted after approval.
 - Disseminate by posting, e-mail, fax, newsletter, etc., Provincial, Local and Bargaining Unit information to leaders and members as appropriate.
- 10. Ensure the Constitution and ONA policies are adhered to at the Bargaining Unit level and that the Bargaining Unit operates within the policies set by the Local.**
 - Review Local policies yearly, prior to budget to ensure complies with constitution.
 - Utilize Board of Directors' expertise for policies and budget preparation.
 - Take policies to Bargaining Unit meeting for review.
 - Adheres to local budget when spending monies, ensures that the Local Coordinator and Treasurer are aware and approve costs related to the booking of meeting rooms for any bargaining preparation.

- 11. Ensure Bargaining Unit Representatives comply with the Bargaining Unit accountabilities outlined within the Service Delivery Guidelines as it relates to contract administration, WSIB, education, long-term disability, modified work, occupational health and safety, Labour Board proceedings and professional responsibility complaints.**
- Identify learning needs and attend identified workshops (based on Local priorities).
 - Liaise with Local Coordinator; advocate on behalf of Bargaining Unit members to meet educational needs.
 - Support, mentor Bargaining Unit leadership team to assist them in fulfilling their accountabilities.
 - Consults with the LRO as required by the Service Delivery Guidelines.
- 12. Ensure there is a process in place for orientation of new members.**
- Get info from the employer re: new hires and orientation dates.
 - Attend orientation/designate (i.e. sign cards, welcome video, give Bargaining Unit leadership contact info, distribute collective agreements as applicable).
 - If the member does not attend, designate a representative to follow up.
 - Send/designate all membership info to ONA Provincial Office.
- 13. Ensure processes are implemented for the collection, receipt and sharing of Bargaining Unit membership information, and that these processes are in compliance with ONA's privacy policy.**
- Ensure membership information records/member entitlement status is updated and amendments provided to ONA Provincial Office as per Local practice.
 - Ensure membership information is placed in secure location (locked office/file).
 - Shred all info no longer needed or is expired, and all info as determined by Provincial and/or Local policy.
 - Identify who is responsible to maintain, keep and store info as per ONA's privacy policy (i.e. Grievance Chair, Occupational Health & Safety, Labour-Management Committee, etc.).
 - Coach and mentor all reps around ONA's policies and procedures (i.e. provide copies, answer questions) relevant to their portfolios. Provide the "section" of the Service Delivery Guidelines relevant to their area of responsibility → hard copy → refer to web site.
 - Ensure electronic records/documents are protected as per ONA policy.
 - Ensure the monthly Dues Remittance Report (DRR) is reviewed for accuracy.

14. Ensures the Treasurer has a current copy of each Bargaining Unit collective agreement.

- Provide collective agreement to Treasurer (hard copy, e-mail electronic); inform how to access via web.

TIER 2 ACCOUNTABILITIES

15. Liaise with the Treasurer to ensure monthly review of the Dues Remittance Report (DRR).

- Have a process in place to identify with the employer the accuracy of the DRR, i.e., meet with the employer, utilize site reps, e-mails, check with members, etc., and report to the Executive.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Job Action Manual [ONA website » Executive Members » Forms & Reference Documents]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p><i>Hospital Labour Disputes Arbitration Act (HLDA)</i> [e-laws.gov.on.ca]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>
<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>A Guide to the Labour-Management Committee [Available through the ONA mailroom]</p>

NEGOTIATIONS COMMITTEE

PURPOSE:

Negotiations are a key priority and legal obligation for the Union. The purpose of the Negotiating Committee is to negotiate a collective agreement that reflects ONA's Mission of "advocating for members to improve the economic welfare and quality of work-life for our members, to enable them to provide high quality health care." The negotiations process is the first step in representing members. Ensuring the collective agreement is upheld is the second step.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **A process is in place for membership input into Bargaining Unit proposal development for Bargaining Unit negotiations.**
 - Consult membership regarding problem areas and potential new proposals.
 - Consult Unit Representatives regarding problem areas and potential new proposals.
 - You may wish to have a Bargaining Unit "Have a Say" questionnaire specific to your collective agreement.
2. **A process is in place for the Bargaining Unit Negotiating Committee to utilize Bargaining Unit information to identify gaps or violations in the collective agreement or Local appendices (grievances, trends, labour-management issues, health and safety issues, professional practice issues and LRO trends/direction).**
 - Review recommendations/concerns from Bargaining Unit leadership/ committee leads (e.g. Grievance, Arbitrations, Labour-Management, Occupational Health and Safety, Human Rights and Equity, Professional Development, Unit Reps, Work Accommodation, Benefit Resource, etc.).
 - Review provincial trends and direction.
 - One-to-one communication with members.
3. **Ongoing communication between the LRO and the Negotiating Committee during all stages of the negotiations process.**
 - Bargaining Unit President will liaise with LRO on an ongoing basis to ensure the Negotiating Team is apprised of the status of bargaining throughout the process.
4. **All committee members have the opportunity to participate and collaborate in the development of strategic outcomes for negotiations.**
 - After reviewing the above feedback, provide a list of issues for potential proposal development to LRO.
 - LRO will develop proposals based on team's feedback.
 - In conjunction with the LRO, review and maintain time lines for "vetting" of proposals, negotiations, conciliation, preparation for interest arbitration, hearing dates.

5. **Negotiating Committee members attend negotiations and participate in the process.**
- Role of Negotiations Team during negotiations:**
 - Scribe verbatim comments of employer on each proposal.
 - Provide background material to support our positions and to assist in responding to employer proposals.
 - Review impact of withdrawals or amendments.
 - Sign off proposals as agreed.
 - Caucus with LRO pre, during and post each meeting as necessary.
 - Sign and support Memorandum of Settlement.
6. **A process is in place for ongoing communication about the status of bargaining to membership and that membership understands the negotiations process.**
- An explanation to membership of the bargaining process including timelines should occur (e.g. through Bargaining Unit meetings, Local/Bargaining Unit newsletter, updates on ONA bulletin board).
7. **Confidentiality is maintained in accordance with privacy policy during data collection throughout the process.**
- Maintain individual confidentiality in accordance with ONA privacy policy.
8. **Keeps the Local Coordinator and Treasurer apprised on the status of bargaining.**

TIER 2 ACCOUNTABILITIES

9. **A process is in place, through the Local Executive, for committee members to identify their learning needs.**
- Team may be part of modified Negotiations Workshop held with LRO, subject to financial approval by the Local Executive.
 - Mentoring and coaching by seasoned Negotiating Team members for new members on the team.
 - Team building – set expectations on how the team will develop proposals, reach consensus during the ongoing negotiation process.
10. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- Review input from Human Rights and Equity Representative for potential proposal development.
11. **The Negotiating Committee functions in a fiscally responsible manner in accordance with Local policy.**
- Local policy must be adhered to regarding any paid time for the negotiation process that is not covered by employer, therefore Bargaining Unit President needs to liaise with Local Coordinator on an ongoing basis.

TIER 3 ACCOUNTABILITIES

12. The Bargaining Unit Negotiating Committee functions in a fiscally responsible manner in accordance with Local policy.

- Local policy must be adhered to regarding any paid time for the negotiation process that is not covered by employer, therefore Bargaining Unit President needs to liaise with Local Coordinator on an ongoing basis.

13. Next steps are planned whether there is a negotiated or awarded collective agreement.

- a. In the right-to-strike sector, ensure members are aware of the process including holding strike mandate meetings. Following a breakdown in negotiations, (including conciliation) ensures members are aware of the process for job action preparation.
- b. For HLDAA, ensure decisions/preparation for Interest arbitration is complete.
- c. Ensure ratification in accordance with ONA policy and Constitution.

If negotiated settlement:

- Notify the Local Coordinator and Local Treasurer and discuss any financial implications re ratification process.
- See ONA Policies re ratification process.
- Utilize the settlement fact sheet developed by the LRO.
- Inform the LRO of the result of the ratification vote (if not in attendance).
- LROs may be present at any ratification vote.
- LROs **will be** present for ratification votes in the right-to-strike sector and will be asked to conduct the vote to ensure it complies with the *Ontario Labour Relations Act*.
- Arrange with the employer for printing and distribution of the collective agreement.

If no negotiated settlement:

- Communicate to members.
- Notify the Local Coordinator re potential Local financial implications.
- Take part in conciliation process.
- Prepare any background material required in preparation for Interest arbitration e.g. “demonstrated need.”
- Attend hearing as necessary.
- Communicate results of the arbitration award to members (e.g. at a meeting, in a newsletter).

Right to strike:

- See the Job Action Manual for step-by-step instructions.

14. Pay is kept whole by the employer for attendance at negotiation meetings in accordance with the collective agreement.

- Note negotiating teams need to be strategic when choosing bargaining dates with the employer so that the majority of hours spent negotiating with the employer is on employer paid time.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Job Action Manual [ONA website » Executive Members » Forms & Reference Documents]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p><i>Hospital Labour Disputes Arbitration Act (HLDA)</i> [e-laws.gov.on.ca]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>
<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	

GRIEVANCE CHAIR

PURPOSE:

Contract administration is the management of violations of the collective agreement, including filing and processing grievances, and is a key priority and legal obligation for the Union. Filing grievances where there are violations of the collective agreement is how we enforce the agreement. The grievance process demonstrates the Union's commitment to members, reflecting the Vision of our organization, "Ontario Nurses' Association: Our Union. Respected. Strong. United. Committed to members who care for people." The grievance process is a collaborative supportive process involving members, Union reps and ONA staff.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. A process is in place to educate the members on how to reach their Grievance Committee representatives.

Develop an intake process:

- Who to call.
 - Unit rep to refer issues to Grievance Chair.
 - Phone #/possible voicemail – refer to Grievance Chair.
 - Identify contact person – ideas (bulletin board, newsletter, and websites).
- Referral to Grievance Chair must be done immediately to respect short timelines under collective agreements.

2. Membership has a printed copy of the current collective agreement.

- Member should have a printed copy of collective agreement.

3. An effective communication process is established in the Bargaining Unit with the District Service Team and the grievor (Grievance Committee, LRO, Litigating LRO, grievor, etc.).

- Contact LRO for advice/wording on grievance or strategies for resolution other than a grievance.
- Provide LRO with file, fact sheets and/or all relevant materials. Connect with LRO re wording/advice, i.e., is it a Union policy or individual grievance. File grievance. Ensure grievance form copies are sent to appropriate people (member, LRO, employer).
- Follow grievance procedure/steps under collective agreement. Arrange Step 2 meetings with LRO. Prep with LRO/member for grievance meetings.
- Liaise with LRO to extend time limits where appropriate.
- Ensure member, LRO and unit representative (if applicable) are aware of ongoing status.

- Grievance Form – specific copies to appropriate people (member, employer, LRO, Grievance Chair).
- Grievance Chair to provide number of grievances to Bargaining Unit President for use in budget planning.
- Identify number of arbitrations, expedited arbitrations under Section 49 of the *Ontario Labour Relations Act* (OLRA), prep meetings. Collate information from other sites/units re violations, trends impacting others.
- Confidentiality issues as per Board Policy. Identify sensitive information and discuss with Bargaining Unit President/LRO regarding how much info can be released.
- Provide high level report back on trends at Bargaining Unit meetings and in a newsletter where applicable.
- Consider what avenues, committees and alternatives to grievances can be utilized to resolve/discuss issues.
- Arbitration tracking – keeping member up to date and aware of date, prep meeting.

4. A process is in place for the timely collection of grievance data.

- Interview potential grievor – use fact sheet and or grievance questionnaires – (for LRO).
- Identify to member their rights as well as ONA's rights and obligations re carriage of grievance. Recourse is Policy 14.1 if decision in dispute.
- Keep track of all conversations or inquiries for potential grievances.
- Keep detailed notes of all meetings.

5. Timelines are maintained as outlined in the grievance process in the collective agreement and ONA Policy 14.1.

- Assist with verbal complaint and ensure response is within timelines. If denied, file within time frames of collective agreement.

6. Confidentiality is maintained in accordance with ONA policy during data collection and throughout the entire grievance process.

- Maintain individual confidentiality in accordance with ONA privacy policy.

7. Membership understands their rights under the collective agreement.

- Develop a process to ensure discipline is removed from an employees file in accordance with the collective agreement.
 - Liaise with employer/member.
 - Create summary sheet (e.g. excel).
 - Check monthly for files to be cleared.
 - Report back to member that file cleared.

- Provide ongoing interpretation of the collective agreement so that members know whether or not they have a grievance.
 - Ensure continued feedback/connect with grievor throughout grievance process.
 - Ensure feedback /connect with incumbent throughout the grievance process in a Job Posting Grievance (ONA Policy 14.3).
- 8. All grievance files (including a copy of the original) are maintained at the Bargaining Unit level in accordance with ONA Policy.**
- Maintain current and past grievance files for use with employer as necessary.
- 9. Proactive review of employer policies (including attendance management) and procedures for potential grievances.**
- Track concerns with employer policies and provide evidence for changes to collective agreement during negotiations.
- 10. All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- Track human rights and equity issues and discuss rationale for enhancements to collective agreement during negotiations.
- 11. Members are represented and supported throughout all stages of the grievance procedure in accordance with the collective agreement, *Labour Relations Act* and the Ontario *Human Rights Code*, and are represented and/or supported through non-disciplinary meetings as required (including employer risk-management processes).**
- Refer to all steps previously highlighted.

TIER 2 ACCOUNTABILITIES

- 12. A process is in place, through the Local Executive, for Grievance Committee representatives to identify their learning needs.**
- Identify ONA workshops that would be beneficial to committee members and incorporate into learning needs assessment for Local Executive.
- 13. A process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and Negotiating Committees for proposal development in bargaining.**
- Track trends for Bargaining Unit President and Negotiating Team (including the LRO) and provide evidence for changes to collective agreement during negotiations.

TIER 3 ACCOUNTABILITIES

- 14. Bargaining Unit needs with respect to grievances are reported to the Local (numbers, potential costs and trends) for Local budgeting process.**
- Keep ongoing list of grievances/status (e-scan report back to Bargaining Unit President):

- Include timelines.
 - May want to use Excel tool or system colour code files, etc.
- 15. Fiscal responsibility in accordance with Local Financial Policies for the grievance/arbitration process.**
- Liaise with Bargaining Unit President who will liaise with Local Coordinator/Treasurer re financial impact of grievances and arbitrations.
- 16. The grievor and Grievance Committee are aware of the dispute resolution mechanism under ONA Policy 14.1 for resolution of disputes regarding the filing of and/or advancement through the grievance procedure.**
- Engage in ongoing discussions with LRO regarding potential disputes, maintain grievance time lines.
 - Refer members to Policy 14.1.
- 17. Pay kept whole by employer for attendance at grievance meetings in accordance with the collective agreement.**
- Arrange time off for member to attend grievance meeting as necessary. Check Local policy/collective agreement.
 - Identify any financial implications to Bargaining Unit President, Local Coordinator and Local Treasurer.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]	<i>Labour Relations Act</i> [e-laws.gov.on.ca]
Service Delivery Manual/ Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]	<i>Employment Standards Act</i> [e-laws.gov.on.ca]
ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Guide to the Grievance Committee [ONA website » Executive Members » Forms & Reference Documents]
Collective Agreements [ONA website » ONA Members » various sector pages]	Guide for Attendance Management Programs [ONA website » Executive Members » Forms & Reference Documents]
Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]	

LABOUR-MANAGEMENT

Also known as Association-Agency Committee or in the hospital sector, as Hospital-Association Committee [HAC]; may also be referred to as the Professional Committee under some collective agreements.

PURPOSE:

The purpose of the Labour-Management Committee is outlined under the collective agreement and may include: promoting and providing effective and meaningful communication of information and ideas including but not limited to workload measurement tools, the promotion of best practices, matters related to orientation and in-service education/programs. Under most collective agreements, this Committee is charged with the responsibility of reviewing and resolving professional practice concerns and ensuring there is on-going feedback between the Union's leaders, membership and ONA staff on the status of issues.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. Membership issues are addressed including workload, quality of work life issues and other issues of mutual concern.

- Members of Committee need to know their role as discussed in the collective agreement.
- Review terms of reference each year at Committee meeting.
- Ensuring that unresolved workload issues are put on agenda.
- Need enough time on agenda for Professional Responsibility Complaints (PRCs) – plan early on agenda.
- Process to get workload complaints from reps. How/where can forms be found? How to fill in forms. Provide envelope with instructions re: return of form – what copy to whom. Develop process. E.g. electronic forms and/or Lock Box.
- Determine if this is an employer-wide issue or a unit/program issue.
- Submit, discuss or receive (depending on who develops agenda) issues to/from employer for addition to agenda. Submit by pre-determined time. Submit week prior to meeting.
- New and amended employer policies should be discussed at Labour-Management Committee meeting before implementation – put as standing item on agenda.
- Professional Development Committee may also be a standing agenda item.

2. A process is in place for members to provide input to the ONA Labour-Management Committee members regarding concerns, including feedback loops to provide information to members on the disposition of issues.

- Process to get any issues affecting members on agenda – use Bargaining Unit meetings, one on one, Unit Rep e-scan report backs, e-mail, etc.

- If no bargaining meeting held, send e-mail to reps to find out issues in advance (standard e-mail template could be used to gather the info). Could make template specific to Bargaining Unit language and highlight current issues.
 - Forum to discuss seasonal closures, etc., organizational program changes, education needs, agency usage tracking and the effect on membership – include as standing agenda item.
 - Address all unresolved unit workload issues as a standing item on the agenda, including maintaining an action plan and tracking tool for all outstanding issues.
- 3. Labour-Management Committee members proactively collect data from members.**
- See #2 above.
- 4. A process is in place to forward unresolved issues in a timely manner as appropriate under the collective agreement.**
- Schedule meetings with employer for year – make sure members can get time off. Employer notifies manager to arrange coverage if working. Ensure collective agreement rights are followed, with employer paid time for meetings, appropriate sign in and payment provided.
 - Copy minutes to LRO.
 - Invite LRO to attend meeting if required.
 - Labour-Management Chair needs to liaise with Grievance Chair re: resolved grievances that may require implementation/follow-up/ongoing monitoring. How and who to get the information from.
 - Ensure management circulates minutes of meeting to employer reps. Bargaining Unit President should circulate minutes of meetings to Bargaining Unit leadership team and Unit Reps. E-mail (if employer permission) copy to reps/post on unit.
 - Develop a process to communicate back to the members the status of their issues.
 - All unresolved issues to be referred to a resolution process, ensure adherence to time lines, e.g. Independent Assessment Committee (IAC).
- 5. Confidentiality is maintained in accordance with ONA policy during data collection and throughout the process.**
- Maintain individual confidentiality in accordance with ONA privacy policy.
- 6. A process is in place for the maintenance and availability of all official and unofficial minutes of meetings for Bargaining Unit uses. Labour-Management meeting minutes and PRC tracking and disposition of issues.**
- Unit reps should have a binder with minutes of meetings in it.

7. All issues brought to the Bargaining Unit have the human rights and equity perspective applied.

- If issue has a human rights component, discuss with Human Rights and Equity Representative first.

TIER 2 ACCOUNTABILITIES

8. Employer pays/reimburses for attendance at Labour-Management Committee meetings in accordance with the collective agreement.

- Provide info to committee member re: payment for attendance. Review collective agreement rights and Local budget.
- Ensure members are paid in accordance with collective agreement. Speak to LRO for assistance.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Professional Practice Concerns and Professional Responsibility Complaints: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>A Guide to the Labour-Management Committee [Available through the ONA mailroom]</p>
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	<p>CNO Standards of Practice [cno.org]</p>

UNIT REPRESENTATIVE

PURPOSE:

This role represents the true grassroots of ONA leadership. The Unit Representative holds a cornerstone role within the Union. The Unit Representative is the “face of ONA and the eyes and ears” on Union matters at the unit level. The Unit Representative holds a pivotal role within the Bargaining Unit leadership team, and assists in ensuring that information/collective agreement violations are reported to the Bargaining Unit leadership team, and that information follows back to members at the unit level to keep them updated on the status of Union matters.

ACCOUNTABILITES:

TIER 1 ACCOUNTABILITIES

1. **Members (and management representatives in accordance with the established practice) are aware of who the Unit Representative is, their role and how they can be contacted**
 - Representatives need to identify themselves to all new members and managers on floor/units and identify role of the reps.
 - Representatives for all units should be posted on board and/or each floor depending on preference of Bargaining Unit (include extensions, e-mail, etc.).
 - All contact information of committee chairs etc., is posted/available on each floor/unit/program.).
 - Bargaining Unit President.
 - Grievance Chair.
 - Occupational Health and Safety.
 - Human Rights and Equity.
 - Reps for floor/unit/program.
 - Negotiations Committee.
 - Labour-Management Committee.
 - Safe Return to Work – modified; WSIB, leave info (sick, pregnancy, leaves of absence).
 - Professional Development.
2. **The Unit Representative has an awareness of labour relations issues on the unit.**
 - a. Collective agreement.
 - b. Scheduling concerns.
 - c. Workload issues.
 - d. Health and safety issues.
 - e. Professional issues.
 - f. Issues where referral to LEAP would be required.
 - g. Issues where referral to ONA malpractice insurance might be required.
 - h. Human rights and equity issues.
 - i. ONA political action.
 - j. CNO Standards of Practice and other regulatory colleges.
 - k. ONA position on attendance management.
 - l. ONA benefits (Johnson Insurance: long-term disability for part-time members).

- Be the eyes and ears for the unit/floor/program.
- Attend rep meetings (or get an alternate) with Bargaining Unit leadership team and do a report back (e-scan) from units covering:
 - Scheduling – staffing, agency, use of nursing resource teams and float pools.
 - Vacancies.
 - Trends e.g. violence.
 - Occupational health and safety issues.
 - Use of casuals.
 - Replacement of RNs with RPNs, RPNs with PSWs.
 - Payroll – overtime.
 - WSIB/modified/accommodated members.
 - Workload – PRCs (identify trends, liaise with Bargaining Unit President, fill in forms, etc.).
 - Professional issues – Nursing Practice Council work.
 - Human rights and equity issues.
- Educate unit members on collective agreement rights and grievance process and refer members to Grievance Chair.
- Refer members to Bargaining Unit President or designate regarding LEAP, WSIB, or ONA benefits issues.
- Attend grievance meeting if requested,
- Be aware of yearly meetings, committees and events that impact members, i.e. Labour-Management, Grievance, Health and Safety, Negotiations, ACC, PCM, Canadian Federation Nurses Union (CFNU), Ontario Federation of Labour (OFL), Canadian Labour Congress (CLC), Joint Sector Meetings, Biennial Convention.
- Have contact information for Bargaining Unit committee chairs.

3. Communication of membership/unit issues to the appropriate Bargaining Unit leadership and/or committee for action and feedback.

- Review unit policies and identify concerns/issues to Bargaining Unit President or designate.
- Disseminate Bargaining Unit, Local and Provincial information to unit, e.g. unit binder on each floor, bulletin board, verbal, e-mail.
- Liaises with appropriate leader e.g. Grievance Chair in gathering information for grievance fact sheet.
- Provide/send monthly envirosan to Bargaining Unit President or designate (Bargaining Unit President will utilize information for ACC envirosan).
- Attend Labour-Management Committee as required.

4. **Unit Representatives have an understanding of their role and responsibilities and knowledge of the collective agreement, Local policies, employer policies, workload reporting process, membership forms and the ONA Constitution.**
- Sign up new members as required ensuring entitlement status. Submit change of address/names of members to Bargaining Unit leadership.
 - Share information and liaise with other Unit Reps.
 - Represent members in meetings with the Manager. Following the meeting, liaise with the Grievance Chair and/or the Bargaining Unit President.
 - Communicate to Bargaining Unit President/LRO when workload reporting process forms are filed and ensure they are acted upon.
5. **A process is in place for the proactive monitoring of unit policies/employer policies with reporting of potential violations to the Bargaining Unit leadership.**
- Liaise with Bargaining Unit leadership on issues such as potential grievances, human rights, occupational health and safety.
6. **Confidentiality is maintained in accordance with ONA policy during data collection and throughout the process.**
- Be cognizant of maintaining confidentiality of member issues.
 - Request alternate representative to deal with unit specific issues if a conflict of interest exists.
7. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- Be cognizant of the challenges faced by members of equity groups and our obligations under the Ontario *Human Rights Code*.

TIER 2 ACCOUNTABILITIES

8. **Dissemination of information to members (information conduit)**
- Post/communicate information on floors in binder or on bulletin board if available.
 - Attend Local and Bargaining Unit meetings or send alternate member to report back to unit representative.
9. **A process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and the Negotiating Committees for proposal development in bargaining.**
- Track trends for Bargaining Unit President and Negotiating Team and provide evidence for changes to collective agreement during negotiations.

TIER 3 ACCOUNTABILITIES

10. A process is in place, through the Local Executive, for Unit Representatives to identify their learning needs.

- Identify learning needs to Bargaining Unit President so can be incorporated into learning needs assessment for Local executive.
- Seek out experienced Bargaining Unit leaders as coach and mentors.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Guide for Attendance Management Programs [ONA website » Executive Members » Forms & Reference Documents]</p>
<p>Service Delivery Manual/ Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	

SITE REPRESENTATIVE AND/OR VICE-PRESIDENT

Where Site Representatives exist under the ONA Constitution.

PURPOSE:

The Site Representative is a member of the Bargaining Unit leadership team and as such is one of the “first contacts” for members. The Site Representative is the “face of ONA and the eyes and ears” on Union matters at the employer site. The Site Representative holds a pivotal role within the Bargaining Unit leadership team, and assists in ensuring that information/collective agreement violations are reported to the Bargaining Unit leadership team, and that information follows back to members at the employer site to keep them updated on the status of Union matters.

The Vice-President’s role and duties will vary in accordance with Local policies.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. Accountabilities, duties and responsibilities are as defined by the Local Executive/Local Policy or Bargaining Unit leadership team as appropriate.

- Have a working knowledge of the ONA Constitution.
- Have knowledge of all Local policies.
- Attend meetings; Local executive meetings, Local meetings, Bargaining Unit meetings.
- Update and maintain unit binders.
- Obtain e-scans from unit representatives.
- Triage questions to appropriate Executive member, ensure responses get back to members.
- Recruit new Unit Representatives.
- May be intake for grievances (may be a member of the Grievance Committee).
- Participate in committees as defined by Local policy or Bargaining Unit Leadership Team (Nursing Week, orientation, Unit Rep meetings, education, benefits, scheduling, professional responsibility, human rights and equity, political action, return to work, etc.).
- Assist with the maintenance of membership information; review site Membership Information Report (MIR) for change of address/member status information; notify Secretary of new members.
- Attend meetings with management as determined by the Bargaining Unit President.

2. Members are aware of the role of the Site Rep and/or Vice-President.

- Be a resource for members and Unit Representatives.

- Provide contact numbers and availability schedule.
- 3. Effective communication process is established in the Bargaining Unit to disseminate information to the Bargaining Unit leadership and membership.**
- Ensure all relevant information is posted in the workplace; update and maintain ONA bulletin boards; utilize electronic postings via e-mail (using the employers system if permitted being cognizant of sensitive and/or confidential material); prepare site reports for the Local Executive meetings and other listed meetings.
 - Post notices as needed, meetings, ratification votes, elections etc.
 - Gather information from units and advance as needed (Bargaining Unit President → Local Coordinator → ACC → PCM → Board of Directors → Local Coordinator → Bargaining Unit President → Bargaining Unit Leadership Team).
- 4. All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- Act as a representative for members on human rights and equity issues as determined, meeting with the employer on harassment issues, member-to-member issues, etc.

TIER 2 ACCOUNTABILITIES

- 5. A process is in place, through the Local Executive, for the representative to identify their learning needs.**
- Identify learning needs and incorporate into learning needs assessment for Local Executive.

TIER 3 ACCOUNTABILITIES

- 6. Payment in accordance with the collective agreement.**
- Be aware of rights under the collective agreement.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]
Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]	
ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]	
Collective Agreements [ONA website » ONA Members » various sector pages]	

HEALTH AND SAFETY REPRESENTATIVES

PURPOSE:

Health and Safety Representatives are key to assisting ONA in achieving its beliefs that: “It is the right of all its members to work in a healthy and safe work environment. It further believes in the pursuit of the highest degree of physical, mental and social well-being of workers in all occupations. As one of the largest health care unions in the province and in the country, ONA believes it is part of its mandate to exercise a strong leadership role in achieving progressively greater gains in the field of occupational health and safety.” Health and Safety Representatives are key advocates for membership in ensuring their legal rights to a safe work environment (legislative and under the collective agreement) are enforced.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **Members are represented in areas of health and safety in accordance with the Constitution, the collective agreement, the *Occupational Health and Safety Act (OHSA)* and regulations.**
 - Be familiar with the provisions that empower workers under the OHSA and pertinent legislation as necessary, the Constitution and collective agreement rights.
2. **The ONA Bargaining Unit has representation on the Joint Health and Safety Committee (JHSC), in accordance with the OHSA and collective agreement, to proactively address and represent the needs of members for a safe and healthy workplace. Ensure such representatives receive payment from the employer for participation on the JHSC in accordance with the OHSA and regulations.**
 - Identify the following standing items on agenda:
 - Injuries.
 - Violence prevention.
 - Form 7s.
 - Incident reports.
 - Inspections and inspection report backs.
 - Renovation and new construction planning.
 - Risk Assessments.
 - Other information as required.
 - In conjunction with LRO, Bargaining Unit President, develop written recommendations to employer and follow-up with Ministry of Labour if needed.
 - Ensure payment for committee members under OHSA for all work/meetings, prep time and inspections, and contact LRO if this is not happening.
 - Ask for confidential voice-mail box to be supplied by employer.

3. **A process is in place, through the Bargaining Unit President to the Local Executive, for representatives to identify their learning needs.**
- Identify educational needs of Health and Safety Reps and incorporate into learning needs assessment for Local executive.
 - Review rights to have “certified training” and other training paid for by employer.
4. **A process is in place to educate the members on how to reach their Health and Safety Representative.**
- Contact information of the Health and Safety Representative with extension number, e-mail address, etc.
5. **A process is in place to collect data and track trends to report to Health and Safety Rep/lead and the Bargaining Unit President with feedback loops to disseminate information back to members.**
- Connect with units, sites to identify occupational health and safety issues.
 - Educate members re rights to a healthy and safe workplace:
 - Through one-on-one contact.
 - Through rep meeting.
 - Education session.
 - Newsletter.
 - Bargaining Unit meetings.
 - Utilize the paid, mandated preparation meeting under the OHSA to liaise with other union Health and Safety Reps to educate/review ONA issues prior to committee meeting (to achieve consensus prior to meeting with employer).
 - Reporting to Bargaining Unit President/Bargaining Unit leadership team/LRO re e-scan, trends, issues and status.
 - Gather facts from Bargaining Unit leadership team, unit reps, LRO, health and safety prime. Put on agenda of committee meeting and prepare for presentation.
 - Ensure accuracy of committee minutes and ensure Bargaining Unit President or health and safety delegate gets copy.
 - Health and safety delegate sends minutes to unit reps.
6. **A process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and the Negotiating Committees for proposal development in bargaining.**
- Identify potential issues for negotiations to Bargaining Unit President.
 - Provide minutes of health and safety meetings to Bargaining Unit President.

7. There is a communication plan to keep the Bargaining Unit President, the Local Executive and LRO informed on health and safety issues, with feedback loops to disseminate information back to members.

- Present report to Bargaining Unit leadership team and Bargaining Unit meetings.
- Inform and send occupational health and safety issues to Bargaining Unit President for inclusion in e-scan report back to Local executive.
- Inform and send LRO health and safety highlights and unresolved issues to determine next steps.
- Ensure employer posts minutes on the health and safety Bulletin Board and is kept current.
- Liaise with Vice-President, Occupational Health and Safety portfolio.
- Participate in Occupational Health and Safety teleconnects as applicable.
- In accordance with Local financial policies plan to attend the annual Health and Safety Caucus.

8. Confidentiality is maintained in accordance with ONA policies during data collection and throughout the process.

- Maintain individual confidentiality in accordance with ONA privacy policy.

TIER 2 ACCOUNTABILITIES

9. A process is in place for annual review by the JHSC of employer established policies and procedures that impact health and safety issues.

- Review employer policies yearly by the Occupational Health and Safety Committee or individually, and place on agenda annually.
- Ensure committee is involved in renovation and new construction planning, including: regular committee updates, front-line unit input prior to finalization of plans, mock-ups for front-line member review, etc.

10. A process is in place to explore options and develop strategies to move unresolved health and safety issues forward.

- Options include complaint to Ministry of Labour, letter to employer senior management and/or Board of Directors, grievances, Labour-Management Committee, negotiation proposals.
- Speak to the Bargaining Unit President and LRO for assistance.

TIER 3 ACCOUNTABILITIES

11. All issues brought to the Bargaining Unit have the human rights and equity perspective applied.

- Identify barriers in workplace that prevent equity for designated groups and determine actions that will support equity for designated groups.

12. All health and safety files are maintained at the Bargaining Unit level in accordance with ONA Policy.

- Maintain binder with minutes, inspections and other material related to ONA actions. Handover to incoming Rep in accordance with Constitution.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p><i>Occupational Health and Safety Act</i> and regulations [e-laws.gov.on.ca]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p><i>Workplace Safety Insurance Act</i> [e-laws.gov.on.ca]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Occupational Health and Safety: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	<p>Violence in the Workplace: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>Ontario <i>Human Rights Code</i> [e-laws.gov.on.ca]</p>	<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>

SAFE RETURN TO WORK/ WORK ACCOMMODATION REPRESENTATIVE

PURPOSE:

The Safe Return to Work/Work Accommodation Representative is essential in supporting members in their return to work (enforcing their legal and contractual rights). The Safe Return to Work/Work Accommodation Representative is charged with the responsibility for ensuring the appropriate Bargaining Unit leaders and LRO are notified of any violation of member's rights as soon as possible in the process.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **Members are represented and supported throughout all stages of the return to work process/accommodation in accordance with the collective agreement and the Ontario *Human Rights Code*.**
 - Ensure early Union involvement.
 - Educate other members on the Union's duty to accommodate (shared obligation with employer as per ONA policy).
 - Educate members re right to see own physician. (See Guide to Attendance Management).
 - Ensure Union is involved in all modified/accommodated work plans.
 - Ensure members are aware of their rights in relations to disclosure of personal health information to Employee Health Service.
 - Identify to Bargaining Unit President members unwilling to have ONA representation so the Bargaining Unit President can speak to the LRO and send template letter to member (available through LRO).

2. **Representatives are educated and aware of their rights under the collective agreement and Ontario *Human Rights Code*.**
 - Identify learning needs.
 - Establish a Return to Work Committee where appropriate.
 - Identify if employer is using consultants. Speak with the LRO regarding disclosure of personal health information to consultants.
 - Be aware of employer obligations to provide modified work for ill and injured employees.
 - Consult with LRO when dealing with difficult accommodations issues. Must have approval of LRO prior to waiving any job posting.
 - Speak with LRO regarding impact of modified work on STD, LTD and WSIB.

3. **Representatives are aware of ONA's Guide to Attendance Management and Return to Work /Accommodation Guide.**
- Rep should have copy of Guide to Attendance Management and seek clarification as necessary with Bargaining Unit President and LRO.
4. **Confidentiality is maintained in accordance with ONA policy during data collection and throughout the process.**
- Maintain individual confidentiality in accordance with ONA privacy policy.

TIER 2 ACCOUNTABILITIES

5. **A process is in place to educate the members on how to reach their Safe Return to Work/Accommodation Representative.**
- Need to educate the membership regarding the importance of Union representation.
 - Identify the name of rep(s), i.e., through Bulletin Board, e-mail, letter handed out by occupational health nurse, staff rooms.
 - Have ongoing liaison with members re their WSIB and LTD claims.
 - Utilize ONA videos as required.
6. **A process is in place so members are represented if the employer refuses to accommodate.**
- Ensure names and contact information is available for members.
 - Liase with the Bargaining Unit President /LRO to ensure that grievances are filed in a timely manner.
7. **The representative proactively reviews all employer policies related to early and safe return to work/accommodation.**
- Provide feedback to Bargaining Unit leadership with any concerns.
 - Be aware of Employee Assistance Plans (EAPs) if any, and request that the employer increase coverage as necessary.
8. **A process is in place to track and support permanently accommodated workers.**
- LRO and Bargaining Unit President to sign off on all permanent accommodations work arrangements.
 - Develop tracking tool that identifies all permanently accommodated workers, their units, description of permanent accommodation.

TIER 3 ACCOUNTABILITIES

9. **There is a communication plan to keep the Bargaining Unit President, the Bargaining Unit leadership, Health and Safety Representative, Health and Safety Network (if applicable), Human Rights and Equity Representative and LRO informed on return-to-work issues, with feedback loops to disseminate information back to members.**
- Provide ongoing feedback to Bargaining Unit President/LRO on status of return to work/accommodations.
 - Liaise with Occupational Health and Safety Rep.
 - Inform LRO re unresolved accommodation. Develop strategies re last-chance agreements in conjunction with LRO and Bargaining Unit President.
 - Liaise with Bargaining Unit Benefits Rep.
10. **A process is in place to inform the Bargaining Unit Negotiation Committee of gaps identified in the collective agreement related to safe return to work.**
- Identify opportunities for potential Bargaining Unit proposals.
11. **A process is in place to collect data and track trends to report to Health and Safety Representative/lead and the Bargaining Unit President.**
- Develop process to track accommodations, those off on STD/LTD/WSIB with dates (Negotiate monthly list from employer to Bargaining Unit President). Inform ONA's Dues Team of extended leaves and review MIR sheets and Dues Deduction Information for LTD/WSIB – dates.
12. **A process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and the Negotiating Committees for proposal development in bargaining.**
- Review provincial directive regarding return-to-work language.
 - Identify gaps/concerns to Bargaining Unit President for potential proposal development.

TIER 4 ACCOUNTABILITIES

13. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- The impact of disability is devastating to the worker. Be cognizant of supporting the member and the work unit to achieve successful accommodation. The member's right to be accommodated is clearly stated in the Ontario *Human Rights Code*.
14. **All safe return to work/accommodation files are maintained at the Bargaining Unit level in accordance with the ONA privacy policy.**
- Maintain binder with minutes, inspections and other material related to ONA actions. Handover to incoming rep in accordance with Constitution.

TIER 5 ACCOUNTABILITIES

15. Pay kept whole by employer for attendance at Return to Work/Accommodation meetings in accordance with the collective agreement.

- Speak to LRO if you require assistance.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p><i>Occupational Health and Safety Act and Regulations</i> [e-laws.gov.on.ca]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p><i>Workplace Safety Insurance Act</i> [e-laws.gov.on.ca]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p><i>Ontario Human Rights Code</i> [e-laws.gov.on.ca]</p>
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	<p><i>Occupational Health and Safety: A Guide for ONA Members</i> [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>Guide for Attendance Management Programs [ONA website » Executive Members » Forms & Reference Documents]</p>	<p><i>Human Rights and Equity: A Guide for ONA Members</i> [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>

HUMAN RIGHTS AND EQUITY REPRESENTATIVE

PURPOSE:

To ensure ONA fulfills its goals expressed in the ONA Statement of Beliefs, which are to promote equity and diversity in the workplace, and protect members' legal and contractual rights to work in environments that are free from harassment and discrimination.

ACCOUNTABILITIES

TIER 1 ACCOUNTABILITIES

1. **Advocacy for an environment that promotes dignity and respect for all, and promotion of an awareness of human rights and equity and membership rights under the Ontario *Human Rights Code*, *Occupational Health and Safety Act*, other relevant legislation and the collective agreement.**
 - First contact and support person for members experiencing discrimination or harassment at work by other members, the employer or agents of the employer (including managers), patients/clients, families of patients/clients or other employees (including physicians).
 - Work with or on the Bargaining Unit Grievance Committee and with the LRO in handling grievances alleging discrimination or harassment. Attend grievance step meetings, preparation meetings and arbitration hearings where appropriate.
 - Sit on any workplace committees or working groups dealing with human rights and equity.
 - Advise the appropriate Chair of Bargaining Unit committees on issues to be raised with management respecting human rights, discrimination and harassment (e.g. Labour-Management, Occupational Health and Safety, Grievance).
 - Assist in the handling of workplace accommodation issues, and where necessary attend accommodation meetings.
2. **A process is in place, through the Local Executive, for committee members to identify their learning needs.**
 - Be available for and attend ongoing education on human rights and equity.
 - Network with other Human Rights and Equity Representatives around the province.
 - Assist the Bargaining Unit and Local in the coordination of formal education.
 - In accordance with Local Financial Policies plan to attend ONA's HR&E Caucus.**
3. **All employer policies are proactively reviewed to ensure compliance with the Ontario *Human Rights Code*, *Occupational Health and Safety Act*, other relevant legislation and collective agreement.**
 - May participate in the formulation and will review anti-discrimination/harassment, attendance management and accommodation policies at the workplace.

- Assist Bargaining Unit committees with review of other employer policies for compliance with the collective agreement and the Ontario *Human Rights Code*.
4. **Confidentiality is maintained in accordance with ONA's privacy policy during data collection throughout the process.**
- Maintain the confidentiality of circumstances, facts and any material that could identify an ONA member who seeks assistance or advice or files a complaint or grievance under the collective agreement, except to the extent that such material is relevant to the resolution or litigation of the complaint or grievance.

TIER 2 ACCOUNTABILITIES

5. **All Bargaining Units adhere to the ONA Constitution in regards to having/endeavouring to have a Human Rights and Equity Representative.**
- Role to be determined by Local/Bargaining Unit Executive and communicated to the LRO and ONA provincial Human Rights and Equity Team.
6. **There is a process for the representation of members with human rights and equity concerns.**
- See activities listed above.

TIER 3 ACCOUNTABILITIES

7. **Member discrimination and harassment is addressed according to ONA policy.**
- Assist a member in accessing employer harassment policy and procedures.
 - Assist a member in accessing ONA's harassment and discrimination policy if occurs during course of Union business or activities.
8. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**

TIER 4 ACCOUNTABILITIES

9. **There is a communication plan to keep the Bargaining Unit President, the Bargaining Unit leadership and LRO informed on human rights and equity issues with appropriate feedback loops.**
- Document/track incidents of discrimination and harassment in the workplace and forward information to the Bargaining Unit President for the purposes of the ACC report backs/enviroscans.
 - Report on issues to the Bargaining Unit President and members at Bargaining Unit meetings.
 - Serve as the Local or Bargaining Unit liaison with the ONA provincial Human Rights and Equity Team and ensure feedback to the members.
 - Ensure name and personal e-mail address if available is submitted on the Executive Booklet so that communications can be received from the Board of Directors.

10. A process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and Negotiating Committee for proposal development in bargaining.

- Identify gaps/concerns for potential contract proposals.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Ontario <i>Human Rights Code</i> [e-laws.gov.on.ca]</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p>Guide for Attendance Management Programs [ONA website » Executive Members » Forms & Reference Documents]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p><i>Workers Safety and Insurance Act</i> [e-laws.gov.on.ca]</p>
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	<p><i>Occupational Health and Safety Act</i> [e-laws.gov.on.ca]</p>
<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	

POLITICAL ACTION

Each Bargaining Unit will endeavour to elect a Political Action Representative who will work in conjunction with Local/regional/provincial representatives.

PURPOSE:

Political action addresses the question “Why We Are Here,” and is an area of further development at the Bargaining Unit/Local levels. Actions in this area link to ONA’s Vision and Statement of Beliefs and advancing the Union’s objectives. There is a direct correlation between members engaging in political action and improving the quality of work life for ONA members on the front lines.

ACCOUNTABILITIES

TIER 1 ACCOUNTABILITIES

1. **A process is in place to develop awareness of and participation in of ONA’s political action activities.**
 - Be informed of ONA provincial campaigns and assist in educating the membership on these issues by answering their questions and referring them to the Bargaining Unit President for further clarification if needed.
 - Coordinate and ensure attendance at rallies and political action events.
2. **Liaison with the Local political action lead, Bargaining Unit President, Local Coordinator, provincial First Vice-President and regional Vice-President.**
 - Ensure your name and personal e-mail address if available is submitted on the Executive Booklet so that communications can be received from the Board of Directors.
 - Work with the Bargaining Unit President to develop a Bargaining Unit Political Action Plan, which is sent to the Local Coordinator and Local Executive for review, provide feedback and/or approve. The Local Executive may apply for funding under ONA Policy 26.11 – Political Action Funding.
 - Develop a communication plan with the Bargaining Unit President, e.g.:
 - Plan to support any political activity in their Local and/or region, such as information and/or strike pickets for ONA’s right to strike members.
 - Plan a calendar of events.
 - Attend meetings.
 - Liaise with other Political Action Representatives.
 - Develop key messages to send to members and for members to use in meeting with their elected representatives.
 - Develop phone trees.
 - Develop and post notices.
3. **A process is in place to plan and motivate Bargaining Unit members to action by:**
 - a. Disseminating information in a timely fashion.
 - b. Integrating plans with Local/region/province.

- c. Being aware of Policy 26.11, and with their Local, develop a plan to submit to the President and regional Vice-President.
 - d. Being aware of resources available to the Bargaining Unit – Local/regional/provincial.
- Post information related to affiliates, such as the Canadian Federation of Nurses Unions (CFNU), Canadian Labour Congress (CLC), Ontario Federation of Labour (OFL), District Labour Councils, Canadian Health Coalition (CHC) and Ontario Health Coalition (OHC).
 - Share information.
 - Be aware of member's interests and actively engage them in specific campaigns.
 - Provide examples/templates, such as letters to MPPs, MPs, Council members, with key messages to be delivered.
 - Be aware of MPP contact list on ONA website.
4. **Facilitate members to connect with MPs, MPPs, municipal politicians, etc., to move the message – intro provided by ONA with key messages, summary of why they should care and why it is relevant.**

TIER 2 ACCOUNTABILITIES

5. **A process is in place, through the Local Executive, for the representative to identify their learning needs.**
- Identify learning needs and incorporate into learning needs assessment for Local Executive.

TIER 3 ACCOUNTABILITIES

6. **Effective communication process is established in the Bargaining Unit to disseminate information to and from other coalitions and affiliates (OHC, OFL, CLC, CHC, CFNU, District Labour Councils).**
- Use unit binders, bulletin boards, newsletters, one-on-one discussions, meetings, etc.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

<p>ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>Canadian Labour Congress (CLC), Canadian Federation of Nurses' Unions (CFNU), Ontario Federation of Labour (OFL), Ontario Health Coalition (OHC), Canadian Health Coalition (CHC)</p>
<p>Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]</p>	<p>ONA website link to Provincial MPPs [ontla.on.ca]</p>
<p>ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>	<p>ONA website link to Federal MPs [parl.gc.ca]</p>
<p>Collective Agreements [ONA website » ONA Members » various sector pages]</p>	<p>Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]</p>
<p>ONA Policy 26.11</p>	

BENEFITS RESOURCE LEAD – LTD, STD, EXTENDED HEALTH CARE (EHC)

The Bargaining Unit President and Bargaining Unit leaders would determine who holds the accountabilities for representation and dissemination of information in accordance with the collective agreement, ONA Policy and Ontario *Human Rights Code*, e.g. Grievance Chair.

PURPOSE:

This is an important role to educate, inform and support members about their rights under the collective agreement, and to make them aware of the other benefits available to them as a Union member. This representative works in collaboration with the Bargaining Unit President, JHSC Representatives and LRO to advise members of their rights.

ACCOUNTABILITIES

TIER 1 ACCOUNTABILITIES

- 1. A process is in place to communicate membership rights and the process to address issues and concerns.**
 - Post contact information in the Bargaining Unit (posters, meetings, e-mail).
 - Discuss role at Bargaining Unit meetings.
 - Develop a communication plan, monthly/quarterly e-mails on topics of interest.
 - Make benefits pamphlets available to members (at ONA meetings, unit binders, e-mail).
 - Share success stories from ONA publications.
- 2. Applicable full-time and part-time members are made aware of available insurance, e.g., long-term disability (LTD), critical illness insurance.**
 - Example: Employer LTD and/or ONA/Johnson LTD, critical illness insurance.
- 3. Process is followed for notification of Bargaining Unit President re members on LTD, Short-Term Disability (STD) or Employment Insurance (EI) Sick Leave.**
 - Review monthly employer lists.
 - Review report back from Unit Reps, Return to Work Reps and/or occupational health and safety leads.
- 4. Connect with the Bargaining Unit President and LRO regarding pertinent information and develop an action plan.**
 - Know who to refer members to for assistance when benefits are denied (Bargaining Unit President, Grievance Chair, LRO, etc.).

5. **Members are represented in accordance with the collective agreement and the Ontario *Human Rights Code*.**
 - Know collective agreement language related to benefits, i.e., LTD, STD, etc.
 - Report member issues to Bargaining Unit President/Grievance Chair in a timely manner.
 - Contact LRO for assistance as necessary.
6. **Confidentiality is maintained in accordance with ONA policies during data collection and throughout the process.**
 - Know collective agreement language, ONA Constitution and Local policies.
7. **There is a communication plan to keep the Bargaining Unit President, Local Executive and Board of Directors/regional Vice-President informed re Johnson Insurance issues, with feedback loops to disseminate information back to members.**
8. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
 - Provide feedback on any patterns that are developing, e.g. age/denial of benefits.
9. **Pensions – Knowledge of who to refer member to regarding pension issues (e.g. Plan, LRO, Grievance Chair).**
 - Encourage members to attend education sessions when offered.
 - Know how to contact the relevant Bargaining Unit leadership team representatives for assistance (including LRO).
10. **EI – Members are aware of EI entitlements (i.e., pregnancy leave, parental leave top-up, sick leave, severance pay) in relation to benefits outlined in the collective agreement.**
 - Know collective agreement language.

TIER 2 ACCOUNTABILITIES

11. **A process is in place to collect data and track trends to report to benefits lead and Bargaining Unit President, with feedback loops to disseminate information back to members.**
 - Contact Occupational Health and Safety Representative and Human Resources department for their assistance in assuring members are given printed information related to benefits provided through their collective agreement.
 - Ensure members are aware of who to contact regarding benefit issues.

- 12. The representative proactively reviews all employer policies and benefit booklets related to LTD, STD and EHC, including attendance management policies.**
- Review amended employer policies and all employer policies annually and provide feedback.
- 13. All files are maintained at the Bargaining Unit level in accordance with ONA policy.**
- Know ONA policies related to file maintenance.
- 14. Knowledge of contact info for EI Commission.**
- Have contact information for EI.
 - Have knowledge of contact information for social assistance.

TIER 3 ACCOUNTABILITIES

- 15. Pay kept whole by employer for attendance at meetings in accordance with the collective agreement.**
- Know collective agreement language.
- 16. A process is in place, through the Local Executive, for the representative to identify their learning needs.**
- Identify educational needs related to accessing the necessary benefits, information related to health and welfare benefits, i.e., EI, STD, LTD, EHC, Johnson Insurance benefits, and incorporate into learning needs assessment for Local Executive.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Canada Employment Insurance Commission (CEIC) [hrsdc.gc.ca]
Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]	Ontario Municipal Employees Retirement Service (OMERS) [omers.com]
ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Healthcare of Ontario Pension Plan (HOOPP) [hoopp.com]
Collective Agreements [ONA website » ONA Members » various sector pages]	Guide for Attendance Management Programs [ONA website » Executive Members » Forms & Reference Documents]
Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]	

WORKLOAD AND PROFESSIONAL RESPONSIBILITY REPRESENTATIVE

PURPOSE:

The Workload and Professional Responsibility Representative assists and supports members in addressing their workload and professional concerns. In conjunction with the Bargaining Unit President, they ensure Professional Responsibility Complaints (PRCs) are processed in a timely and effective manner.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **Provision of informal education to members, with the support of the LRO.**
 - Coach members on how to speak to their manager about their workload concerns as per the collective agreement.
 - Ensure members are aware of the benefits of filling out the Professional Responsibility Workload Report Form (PRWRF).
 - Assist members with filling out the PRWRF correctly and in a timely fashion.
 - Ensure members know that they must retain one copy of the form, give a copy to their manager and send two copies of their form to the Bargaining Unit President (who will send a copy of the form to the LRO).
 - When using the electronic form, ensure all of the aforementioned are copied.
2. **Communicate PRC trends, resolutions and issues to the Bargaining Unit leadership and LRO.**
3. **Meet with members on a unit prior to a Labour-Management Meeting.**
 - Identify member concerns and develop strategies for resolution.
 - Gather evidence to support member concerns, including data from the College of Nurses of Ontario (CNO)/regulatory colleges and various nursing/health care associations.
 - Identify recommendations and coach the members on how to present their concerns and recommendations to management.
4. **In conjunction with the Bargaining Unit President, present recommendations at Labour-Management, ideally with unit committee members in attendance, and ensure PRC issues are processed in accordance with the collective agreement timelines.**
 - Maintain an action plan and tracking tool of all issues, including the disposition/ outcome of recommendations and strategies implemented to address the issues.

5. **Establish a working relationship with the employer to resolve professional practice concerns.**
6. **Assist Professional Practice Specialist in preparing for a mediation and/or IAC hearing (where applicable).**

TIER 2 ACCOUNTABILITIES

7. **A process is in place, through the Local Executive, for the Representative to identify their learning needs.**
 - Identify learning needs and incorporate into learning needs assessment for Local Executive.
8. **All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**

Reference Materials (Contact your Regional Vice-President for assistance in locating):

ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Professional Practice Concerns and Professional Responsibility Complaints: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]
Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]	CNO Standards of Practice [cno.org]
ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]
Collective Agreements [ONA website » ONA Members » various sector pages]	Professional Responsibility Decision Tree – a Strategy for Resolving Workload Complaints [ONA website » Professional Practice » Resources]
ONA E-Learning Modules on PRCs - sector specific [ONA website » Education » eLearning]	

PROFESSIONAL DEVELOPMENT

PURPOSE:

To ensure that, where language exists for a Professional Development Committee, ONA members are represented. The practice environment should support continuous learning, providing members with access to professional development opportunities.

ACCOUNTABILITIES

TIER 1 ACCOUNTABILITIES

1. **There is a functioning Professional Development Committee in accordance with the collective agreement and relevant legislation.**
 - Number of representatives as per the collective agreement.
 - Contact employer to set meetings. Try for prescheduled meetings. Ensure minimum number of meetings held in accordance with the collective agreement if applicable.
 - In many Bargaining Units, the Committee may become part of the Labour-Management Committee.
 - The committee is not a Unit/Hospital Nursing Practice Council, however if wanting to integrate these two committees, the collective agreement must be followed. Speak to LRO for assistance.
2. **Membership representation on the committee is in accordance with the collective agreement, or if no collective agreement, employer policy and/or practice would apply.**
 - Seek out members interested in professional development to be part of the committee.
3. **A process is in place to annually review terms of reference for the Professional Development Committee.**
 - Review the terms of reference annually and make recommendations for change as needed (refer to ONA General Guidelines for Professional Development Committees).
 - Establish the line of communication for feedback from the Chief Nursing Officer or designate (e.g. off-line or in meeting).
 - Establish the committee's goals for the year.
4. **Promote a positive practice environment that supports learning.**
5. **Promote initiatives that encourage equal access to professional development and opportunities.**
 - Be informed about alternative funding initiatives such as RNAO, Registered Nurses Foundation of Ontario (RNFOO), bursaries, government funding, etc.

- Know collective agreement language and/or employer policies regarding paid staff education.
 - Identify education budgets per unit program, potential percentage of nursing budget toward employer education annually, e.g. through the hospital Fiscal Advisory Committee (FAC).
- 6. A process is in place to elect ONA members to the committee as per collective agreement and/or Constitution.**
- Post names and contact information on representatives on ONA bulletin board and employer communication vehicles.
- 7. Meetings are scheduled as per collective agreement and /or employer policy/ practice.**
- 8. Members are educated on who the representatives are and the process to move issues forward.**
- Gather information/issues from members through one-on-one discussions, e-mail correspondence, report back from Unit Reps, Bargaining Unit leadership team.
 - Ensure member issues are placed on meeting agendas.
 - Report back to members on the disposition of their issues and how their issues will be addressed.
 - Survey membership for issues, suggestion boxes, etc.
- 9. All issues brought to the Bargaining Unit have the human rights and equity perspective applied.**
- Check that employer policies regarding payment for or access to educational opportunities do not disadvantage equity groups.
 - Look at unit demographics when noting education opportunities to identify priority needs, including age (succession planning).
 - Specifically seek out Human Rights and Equity educational opportunities for Committee's review.
- 10. A process is in place, through the Local Executive, for the representative to identify their learning needs.**
- Identify mentors and/or experts to liaise with to meet learning needs in representing members.
 - Identify ONA workshops that would be beneficial, and incorporate into learning needs assessment for Local Executive.

TIER 2 ACCOUNTABILITIES

11. A process is in place to communicate decisions and outcomes to members and Bargaining Unit Leadership.

- Post minutes as per Bargaining Unit process. Incorporate issues, action plan, and next steps with timeline.
- Establish a communication plan to keep members informed of decisions and opportunities: web page links, unit bulletins, minutes of meetings, unit reports, e-mails, verbal reports at Bargaining Unit meetings.
- Link with Nursing Council and Labour-Management to cross-reference issues.
- Keep Bargaining Unit President informed of ongoing work.

TIER 3 ACCOUNTABILITIES

12. Awareness of professional development scope, i.e. academic programs, certification programs, continuing education, distance learning, professional groups and associations, professional journals.

- Connect with local universities and colleges; learn what opportunities are available, including distance education for nurses.
- In addition, identify ONA, OFL, CLC and Workers Health and Safety Centre (WHSC) educational workshops that are available to advance the nurses' professional development.

13. Pay kept whole by the employer for attendance at professional development meetings as per the collective agreement.

- Know your rights under the collective agreement for paid attendance at meetings.
- Determine sign-in/payment process for attendees.

Reference Materials (Contact your Regional Vice-President for assistance in locating):

ONA Constitution and Statement of Beliefs [ONA website » Publications & Forms » Booklets, Guides & Manuals]	ONA General Guidelines for Professional Development Committees
Service Delivery Manual/Service Delivery Guidelines [ONA website » Executive Members » Forms & Reference Documents]	CNO Standards of Practice [cno.org]
ONA Policy Manual [ONA website » Publications & Forms » Booklets, Guides & Manuals]	Human Rights and Equity: A Guide for ONA Members [ONA website » Publications & Forms » Booklets, Guides & Manuals]
Collective Agreements [ONA website » ONA Members » various sector pages]	

LOCAL EXECUTIVE

PURPOSE:

Through teamwork, administer the affairs of the Chartered Local Association, representing the interests of its members and the broader organization. The Local Executive is accountable for their personal code of conduct, achieving their outcomes and representing the members as outlined in the Constitution. The Local Executive is accountable for the financial stability of the Local through strategic/fiscal planning, within the framework of ONA's mandatory financial policies and ONA's Constitution.

ACCOUNTABILITIES:

- Ensure a strategic planning process takes place as outlined in the Constitution and the mandatory policies, which includes input from all Bargaining Units.
- Ensure there are Local policies in place that have been voted on and approved by the membership that support expenditure of Local funds by March 31 of each year.
- Through a strategic planning and budgeting process, identify member needs and work towards solutions.
- Ensure all members of the Executive Committee have input into the selection of an auditor.
- Provide access to education for members to ensure they know their rights under the collective agreement.
- Ensure the following services are provided to members of the Local:
 - Administration of collective agreements locally.
 - Processing of grievances.
 - Education for members at the Bargaining Unit level.
 - Representation and resolution of incidents of discrimination, racism and harassment under the Ontario *Human Rights Code*.
 - Communication.
- Model ONA's Vision, Values and Guiding Principles.
- Demonstrate leadership and serve as a coach and mentor to the members.
- Accept the responsibility and accountability of being a leader in the decision-making process.
- Actively seek feedback from Local membership on the Local's functioning and leadership.
- Ensure a process is implemented for the election/appointment of all positions utilizing the election guidelines at the Local and Bargaining Unit level.
- Ensure all leaders are aware of the roles and accountabilities of their position.
- Ensure processes are developed and implemented for the collection, receipt and sharing of Local and membership information, and that these processes are in compliance with ONA's Privacy Policy.
- Identify and carry forward governance issues to regional and provincial levels of decision-making.
- Ensure ongoing liaison with the District Service Teams and Vice-Presidents regarding Local education needs and servicing trends, and ensure Executive Committee members are informed about Service Delivery Guidelines and Bargaining Unit and Local Executive Accountabilities with Role Descriptions.
- Advocate on behalf of the members with employer associations, government decision-makers and Local stakeholders.
- Ensure decisions made by the Local Executive are disseminated and implemented at the Bargaining Unit level.
- Ensure the Local/Bargaining Unit is informed about the accountabilities as outlined in the Service Delivery Guidelines.

LOCAL COORDINATOR

PURPOSE:

To coordinate and facilitate the functioning of the Local within the ONA Constitution and policies, and ensure there is effective communication throughout the Local and all levels of the organization.

To act as a resource on governance issues and provide advice regarding the appropriate District Service Team resources for information related to labour relations issues; serve as the link between the broader membership and the ONA Board of Directors.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **Attend meetings as the voice for all members of the Local or send alternate.**
 - Attend ACCs, PCMs, Joint Sector Meetings, Sector Meetings and Biennial Conventions, and act as voting delegate as appropriate.
 - Hold meetings of Executive and Local as per the ONA Constitution.
 - As per the ONA Constitution, attend a minimum of one meeting of each Bargaining Unit in the Local per term of office, and additional meetings of the Bargaining Units as may be necessary.
2. **Ensure elections are held in accordance with the ONA Constitution and the Local and Bargaining Unit Election Policy at the Local and Bargaining Unit Levels.**
 - Ensures that the Executive booklet is updated and returned to ONA in a timely manner on an annual basis.
3. **Ensure processes are in place for the effective dissemination of information and learnings through out the organization, locally and provincially.**
 - Develop e-mail/contact lists for Bargaining Unit Reps.
 - Keep up-to-date with ONA communications, including e-mail, voicemail, and regular mail, and disseminate info to appropriate leaders.
4. **Ensure processes are in place to actively seek feedback and incorporate that information into the decision-making process at the Local level, and are in keeping with Service Delivery Guidelines.**
 - Request Bargaining Unit e-scan from Bargaining Unit Presidents and incorporate into Local e-scan report back for ACC.
 - Provide opportunity for report back of Bargaining Unit issues at each Local Executive meeting.

5. **Establish processes to ensure interactive communication between the Local Coordinator and Local Executive on Local activities and functioning.**
 - Communication on Local activity, i.e. using web, fax, e-mail, phone calls, voice-mail, postings, newsletter, etc.
 - Set up yearly timetables.
 - Set Local Executive Meetings for calendar year.
6. **Ensure all Bargaining Units within the Local have input into the strategic planning process, including education for their members.**
 - Utilize (provide) education template to Executive to bring to budget meeting so priority education needs are identified.
 - Submit Local education plan to ONA Provincial Office. Local Executive to determine who will attend ACC/PCM/Joint Sector Meeting/Biennial Convention with Local Coordinator. At all Executive meetings, ask Executive to bring information on upcoming negotiations, arbitrations, grievances, professional practice issues so budget can be planned.
 - Review budget actuals vs. budget and current activity.
7. **To have a comprehensive understanding of ONA's Constitution.**
 - Ensure ONA Constitution and polices are followed/enacted.
 - Keep ONA Constitution for reference when setting meetings, elections etc.
 - Use Board member as resource to clarify questions.
8. **Ensure there is ongoing communication with the regional Vice-President and the First Vice-Coordinator of the Local on any issues and concerns within the Local.**
 - Provide e-scan to Board member two weeks ahead of ACC. Copy the Vice-Coordinator on any issue.
 - * Notify Executive when away and who to contact, i.e. Vice-Coordinator.

TIER 2 ACCOUNTABILITIES

9. **Ensure work is delegated to the appropriate person(s).**
 - At the beginning of each year, review and assign portfolio assignments to each member of Executive, i.e. what their roles are.
10. **Ensure all reports generated from ONA's Provincial Office are reviewed and disseminated, and any updates are provided as required (e.g. MIR, Executive Listings).**
 - Distribute MIR, Executive Booklet, DRR at Executive Meetings.

- Ensure that the Bargaining Unit Presidents understand their accountability in review the monthly DRR for accuracy and inform the Treasurer and Local Coordinator of any errors.
- January, have Executive review information in Executive Booklet – process any changes → send to ONA (update) even if no change.

TIER 3 ACCOUNTABILITIES

11. Ensure processes are developed and implemented for the collection, receipt and sharing of Local and membership information, and that these processes are in compliance with ONA's privacy policy.

- Information on members used for ONA business.
- Review Local policy and comply with ONA privacy policy.
- No member information in memos or newsletters.
- Only use ONA/personal email. Do not use employer email for ONA business.

FIRST VICE COORDINATOR

PURPOSE:

Working in collaboration with the Local Coordinator to coordinate and facilitate the functioning of the Local within the Constitution and ONA policies, and ensure there is effective communication throughout the Local and all levels of the organization. In the absence of the Local Coordinator, act as a resource on governance issues and provide advice regarding the appropriate District Service Team resources for information related to labour relations issues.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **In the absence of the Local Coordinator, is accountable for all activities of the Local and fulfilling the duties of the Local Coordinator.**
 - Local policies determined that First Vice-President may assume the role of Local Coordinator when Local Coordinator unavailable, and any other duties as assigned by Local Executive.
 - Communication process that identifies current priorities in absence of Local Coordinator.
 - Review all communications from Local Coordinator.
 - Need to be aware of how Local Coordinator disseminates information to the Local Executive. Needs to have working knowledge.
 - Notify Local Coordinator when NOT available.
 - Attend all meetings normally attended and/or chaired by Local Coordinator, or in accordance with Local policies.
2. **To have a comprehensive understanding of ONA's Constitution.**
 - Know where in ONA Constitution the First Vice-Coordinator role is defined as Executive Member.
 - Self-identify learning needs in order to meet accountabilities.
3. **Establish processes to ensure interactive communication between the Local Coordinator and Vice Coordinator on Local activities and functioning.**
 - Communication process Local Coordinator – Executive meeting: e-mails, voicemail, awareness of e-scans, group e-mails and phone chains.
4. **In the absence of the Local Coordinator ensure timely, effective communication of provincial information to the Local Executive Committee and ensures communication occurs at the Bargaining Unit level.**
 - In the absence of Local Coordinator, is the conduit for all information received from provincial Leadership to the Local Executive (see above).
 - May attend Bargaining Unit meeting when invited as per ONA Constitution.

TREASURER

PURPOSE:

In conjunction with the Local Executive team ensures the financial stability of the Local through strategic/fiscal planning within the framework of ONA's mandatory financial policies (see Local Financial Policy Guide) and ONA's Constitution.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **Communicate with Local Coordinator and Bargaining Unit Presidents on a regular basis to determine evolving Bargaining Unit needs and incorporating those changes into the Local's strategic/fiscal plan.**
 - Ongoing dialogue with Local Executive regarding impact of Local's work on approved budget.
 - The Local Executive to develop policy as required.
2. **Ensure the Local Coordinator and Executive team receive a written monthly financial overview of the Local, including variances and possible need to access Supplemental Funding.**
 - E-mail/mail or present at Executive meetings monthly financial reports.
3. **Ensure ONA Constitution and policies are adhered to when doing strategic/fiscal planning.**
 - Connect with Vice-President Finance as required.
 - Attend Treasurers Workshop/identify additional education needs.
 - Utilize template documents.
 - Review Bargaining Unit needs presented at budget prep meeting to determine Local financial priorities.
 - Contact Simply Help Desk for assistance as needed.
 - In collaboration with the Local Executive Committee, determine the auditor and document in the minutes.
4. **Disseminate information throughout the Local, and provincially when necessary.**
 - Executive and Local meetings, and per the Local Financial Policy Guide.
 - Back up files with Filr.
5. **Ensure there are up-to-date membership-approved Local financial policies regarding Local expenditures.**
 - Review all Local policies annually as per policy at Local Executive meeting. Local Executive to take to Local meeting for annual review and approval.

- Assist with amendments to policies in accordance with auditor recommendations and ensure membership approval is recorded.
- Identify gaps in policies and develop/revise policies as needed and ensure membership approval.
- Be aware of, understand and use the Local Financial Policy Guide as a resource.

6. Ensure Local financial records are kept up-to-date and complete.

- Executive meeting must have updated financial report.
- Provide monthly reports as per ONA policy.
- Ensure that the Bargaining Unit Presidents understand their accountability in review the monthly DRR for accuracy and inform the Treasurer and Local Coordinator of any errors.
- Maintain data in Filr backup files as per ONA policy.
- Keep one official hard copy of monthly report as per ONA policy. See Sage 50 work manual – month end and year end checklist.

7. Liaise with employer/ONA finance staff regarding dues amounts and Local dues levy.

- Review incoming monies for accuracy.
- Determine any gaps and discuss with ONA staff.

TIER 2 ACCOUNTABILITIES

8. Liaise with the Local auditor.

- Executive approval required by motion to appoint auditor and minuted.
- In collaboration with the Local Executive Committee, set meeting dates/books closing (e.g. date final expenses are due).
- As identified by the Local Executive Committee, investment of monies with input from bank/auditor.
- Treasurer and Local Coordinator to meet with auditor at year end, send signed audited statements to ONA in accordance with policy.
- After entering adjustments from auditor, send backup file to ONA.

9. Ensure Local auditor receives copies of Local minutes that include approval of expenditures and locally approved policies.

- Send signed approved minutes from Secretary to auditor.

10. **Liaise with Bargaining Unit President to ensure a monthly review of DRR and provide monthly updates as needed to dues/membership.**
 - Check DRR on a monthly basis.
11. **Ensure Local processes for the collection, receipt and sharing of Local membership information, in compliance with ONA's privacy policy, are reviewed when sharing membership information.**
 - Use membership info only for ONA business.
 - File cabinets – locked.
 - Shred documents.
12. **Ensure the appropriate benefits are deducted when paying salary by reviewing the appropriate collective agreement, and consult with the servicing LRO to confirm which benefits should be billed for by the employer.**
 - Copies of all collective agreements – contact Bargaining Unit President, who will contact employer and list LRO by Bargaining Unit or intake process.
 - Review benefits analysis list from LRO after each round of bargaining or when collective agreement renewed.
13. **Ensure respective employers are informed annually of any special dues levy established and approved by membership, and the benefits that should be billed for by the employer.**
 - Notify ONA re dues levy in accordance with policy so that ONA can notify the employers yearly. If there are amendments to the local levy made during the year, the Treasurer notifies each employer in the local.
14. **Ensure the ONA Financial Specialist is informed in writing annually of any special dues levy established and approved by membership.**
 - Send letter to specialist of dues levy with a copy of the motion.
 - Notify employer and ONA Financial Specialist in writing of any amendments to the dues levy after the annual dues notice has been sent.

TIER 3 ACCOUNTABILITIES

15. **Ensure timely processing of expenses.**
 - Liaise with Bargaining Unit President to clarify member expenses.
 - Liaise with Local Coordinator re unexpected expenses.
16. **Utilization of Bookkeeper (if applicable).**
 - Work with Local Executive to develop process for hiring of bookkeeper (after consultation with Vice-President Finance).
 - Develop with Local Executive the role and expectations for the bookkeeper.
 - Ensure bookkeeper responsibilities are completed.

- Ensure ongoing liaison with bookkeeper.

Note: Please see ONA Local Financial Policy Guide (including Section 7: Treasurer's Checklist) for a more comprehensive list of duties.

SECRETARY

PURPOSE:

Through collaboration with other members of the Local Executive team, maintains accurate records and manages correspondence for the Local.

ACCOUNTABILITIES:

TIER 1 ACCOUNTABILITIES

1. **In collaboration with the Local Executive team, maintain an accurate database for the Local membership.**
 - Responsible for updating and maintaining MIR in collaboration with the Local Executive team and Bargaining Unit Representatives.
2. **Ensure Local processes for the collection, receipt and sharing of Local membership information, in compliance with ONA's privacy policy, are reviewed when sharing membership information.**
 - Is aware of ONA policy re confidentiality of membership information.
3. **Work in collaboration with Bargaining Unit Presidents to monitor the status of and update membership and executive information, and by utilizing appropriate forms and/or reports, forward this information to ONA Provincial Office attention Dues/Membership.**
 - In conjunction with Treasurer, maintains DRR, MIR and carries out other duties as per Local policy.
4. **Ensures the Bargaining Unit is actively signing up members**
 - Bargaining Unit Presidents provide the forms to Secretaries for filing to ONA.
 - Maintain copy of these forms locally.
5. **As per the Constitution, ensures all information pertaining to Local activity is recorded, maintained and accessible as needed.**
 - Records Minutes.
 - Identify educational needs for Secretary duties to Local.
 - Minute inclusions: - attendees, agenda, Treasurers Report with present balances and any issues arising. Minute educational needs, plans and may have responsibility to plan and keep records of education attended. Minute approval of special dues levy and appointment of auditor. Minute discussion and topics and outcomes/motions – include Action Plans. (See Guide to Minutes, Motions and Meticulous Meetings).
 - Ensure that the minutes are signed as per policy.
 - Book meeting room and equipment as required.

- Adhere to ONA policy re: length of time records must be kept (Policy 8.2).
- For electronic documentation, identify process for saving documents/minutes for ease of retrieval later. Back-up should be done. Safe process for saving records. Standard naming conventions.

6. Works in collaboration with the Local Coordinator around correspondence and communication to and from the Bargaining Units, Local and the Organization.

- In conjunction with the Local Coordinator, plan, set and distribute meeting agendas and notices as per Constitution.
- Send minutes out to all Executive for review at next Executive Meeting.
- Signs along with Local Coordinator, Minutes once approved and makes copy of each for auditor.
- Ask for agenda items from Executive Members.
- Develop/sends correspondence as required and maintains files.
- Bookings and registrations for PCMs and other conferences/meetings as approved by the Local Executive in accordance with local practice/policy.

7. Ensures that the Local Auditor receives copies of Local minutes that includes Local approval for expenditures and locally approved policies.

- In collaboration with the treasurer provides Local Minutes to the Auditor.