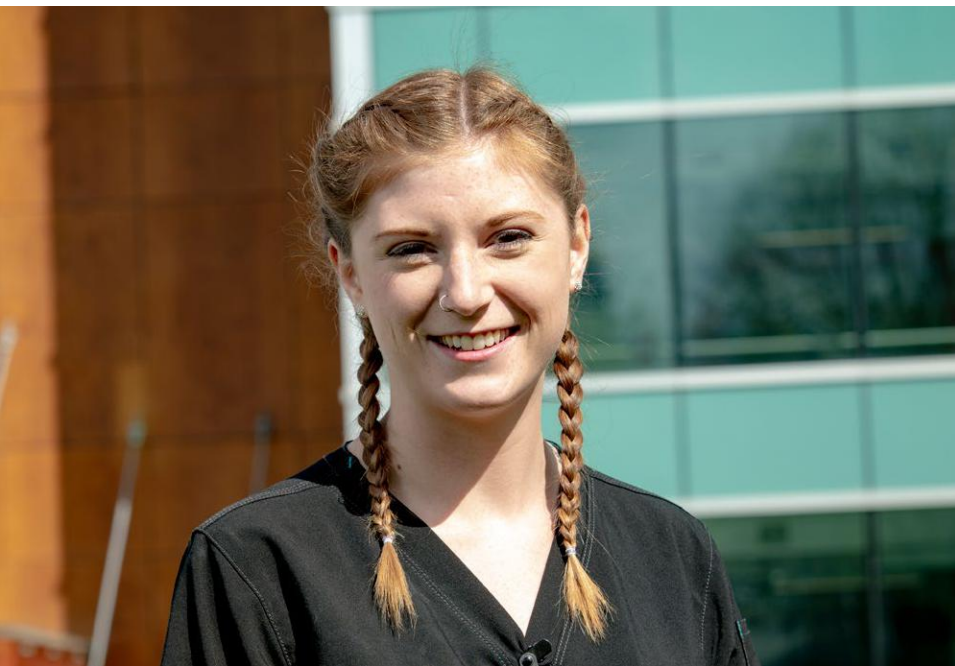




# Local Building Manual

2026

—  
A guide to building your local's organizing power.



# Contents

<b>INTRODUCTION.....</b>	<b>6</b>
Building strong locals.....	6
Local-building secrets.....	7
Objectives of this local building manual.....	8
<b>STRONG LOCALS .....</b>	<b>9</b>
What makes a strong local?.....	9
Strong locals involve and engage members .....	9
Strong locals provide good leadership .....	10
Strong locals defend members’ rights and resolve disputes.....	11
Strong locals are active in union and community campaigns.....	11
<b>ASSESS AND PRIORITIZE.....</b>	<b>13</b>
Assess locals in your region.....	13
Prioritize for local-building.....	13
Local assessment agenda template .....	15
<b>COMMUNICATING AND ENGAGING WITH LOCALS.....</b>	<b>16</b>
Communications and meetings.....	16
i. Meet with the local.....	16
ii. Preparing for a local-building meeting .....	17
iii. Communication tips for meetings.....	18
iv. One-on-one conversations .....	19

## **CREATE A PLAN ..... 21**

Communications and meetings.....	21
i. Identify building priorities for the local.....	21
ii. Establish realistic goals and actions.....	22
iii. Submit the plan .....	23
Example: local building worksheet .....	24
Local building plan priorities worksheet.....	25
Local building planning form .....	29

## **TAKE ACTION ..... 31**

Take action: overview.....	31
i. Resources .....	31
ii. Actions.....	32
Member contact lists.....	32
List-building.....	32
Contact campaigns .....	32
Email tips.....	33
HEU contact sign-up sheet.....	34
Mapping the local .....	35
Engagement bullseye.....	35
Chart your members.....	36
Mapping natural groups .....	37
Mapping groups worksheet.....	38
Participation in local union meetings.....	40
Get your meeting invitation noticed:.....	40
Make the meeting accessible:.....	40
Provide incentives to attend:.....	40
Make the meeting worthwhile:.....	40
Local meeting agenda template .....	41
What's in an agenda? .....	42
Adopting local by-laws.....	43
What are by-laws? .....	43
Making by-laws .....	44
Reviewing existing by-laws .....	44
What to include in by-laws?.....	45
HEU local by-law template.....	45

HEU local by-law example.....	45
HEU local spending example.....	46
Local-building events.....	47
Process.....	48
Submit.....	48
Funding.....	48
Report.....	49
Event example.....	49
Issues.....	49
Strengths.....	49
Goals.....	50
Local project fund.....	51
Local project fund application details.....	51
Local project fund application.....	53
Local project fund report.....	55
Education training.....	57
Examples of heu workshops.....	57
Conflict resolution.....	58
Where to start.....	58
Online and hybrid meeting training.....	59
Resources include:.....	60
Training videos include:.....	60
Shop floor engagement tools.....	60
i. Preparing to listen.....	61
ii. Listening to understand and create empathy.....	62
iii. Non-verbal behaviours for better communications.....	63
Active listening skills.....	64
Reflecting feelings.....	64
Paraphrasing.....	64
Questioning.....	64
Descriptive language.....	64
“I” statements.....	65
Maintaining silence.....	65
Summarizing.....	65
Local building resources.....	65
Local budgeting.....	66
Local supplement.....	66

Drafting by-laws .....	66
Local annual budget and quarterly tracking template .....	67
Small and mid-sized local supplement application .....	68
Small- and mid-sized local supplement (smls).....	69
Application details.....	69
Local meeting report worksheet .....	70

**INDEX OF POLICIES .....72**

Local project fund policy .....	72
Local project fund application.....	74
Provincial executive policy	
provincial executive attendance at local meetings.....	76
Local invitations for pe members to attend local meetings.....	76
Annual local election meetings .....	76
Provincial issues, campaigns or initiatives.....	76
Local building .....	76
General.....	77
Policy to protect human rights, prevent bullying and encourage mutual respect .	78
Scope .....	79
Procedures.....	79
First step: direct discussion .....	79
Second step: informal complaint .....	79
Third step: mediation.....	79
Fourth step: formal complaint .....	80



# Introduction

## **BUILDING STRONG LOCALS**

Locals are the foundation of any union. And strong locals create a more powerful HEU when it comes to defending and advancing members' rights.

When strong locals support the work of our provincial union, HEU can take on even bigger challenges, as we continue to be a leading trade union not only in British Columbia but across Canada as well. We have a long and proud history of protecting public services, defending Medicare, and winning landmark Supreme Court cases that challenged labour and human rights violations. These victories benefit all Canadian workers.

It is the responsibility of HEU's elected regional vice-presidents (RVPs) to work with union leadership and local members to support building and maintaining strong locals within their area.

Local-building projects help local executives function independently and cohesively, deepen members' ability to be engaged and informed, and ensure collective agreement and health and safety standards are enforced.

Ultimately, local-building increases member mobilization, strengthens relationships, increases the union's capacity, and ensures equity within HEU.

But we need your leadership in local-building to keep HEU strong.

## Local-building secrets

As an RVP who supports local-building, you are taking on a significant organizing project on behalf of the union.

To help with this work, the U.S.-based *Labor Education and Research Project* has identified a set of principles for any organizing effort, which have been adapted for HEU's local-building.

If you follow these principles, you will have a greater chance of success, both for yourself and your local members.

1. **TALK ONE-ON-ONE:** Listen to what members are saying. Help them find their voice to share their own ideas. Don't just let them gossip or gripe – instead, guide them to focus on concrete problems that can be solved.
2. **ENCOURAGE CONFIDENCE:** Members may feel scared, frustrated or hopeless. A calm and confident attitude helps. Remind workers what will happen if they do nothing. Help them draw on their righteous indignation instead of their fear.
3. **CHALLENGE AUTHORITY:** Organizers don't need to demonize the employer. But we do need to encourage members to question authority and stand up for each other. Figure out how to confront the people in power.
4. **RECRUIT GOOD LEADERS:** Take note of who is naturally respected and encourage them to take on leadership roles. Look for each person's talents and find ways to use them. Don't let the "whiners" set the tone.
5. **IDENTIFY COMMON PROBLEMS AND SHARED HOPES:** You are organizing to bring members together. Talk and listen until you've found a problem that matters to lots of members in the local. Help members identify and share their problems and hopes.
6. **ORGANIZE DEMOCRATICALLY:** Be sure to include everyone who is, or might be, affected. Reach out beyond the local executive. Solicit opinions and involve as many members as possible in decision-making. Find a role for everyone.
7. **SET CONCRETE GOALS:** Goals should be specific. State clearly what a victory would be. Make sure most members share this goal.
8. **GET PEOPLE MOVING:** Even simple collective activity is better than just talking. Action breeds commitment. Develop plans that involve small steps. Each step should slowly increase the visibility and strength of the group.
9. **STICK TOGETHER:** As long as an action is collective (i.e. a "general grievance"), you won't leave individuals vulnerable should the local take steps that challenge their employer. Design an activity that brings members together.
10. **NO SHORTCUTS:** Help local leaders resist the temptation to do everything themselves, or to send out a mass email and consider members informed. Even if it seems challenging at first, getting more people involved is the only way to keep things going over the long run.

11. **TURN UP THE HEAT (WHEN NEEDED):** If your local is taking action against the employer, start with small actions that will probably succeed. With new confidence, members will be inspired to take bigger and riskier steps. For example: HEU's contracted support services workers did an orange shoelace campaign where they all wore orange shoelaces to work in solidarity around bargaining. It's a simple action that doesn't impact patient/resident care and it's also not offensive to the employer.
12. **EVALUATE AS YOU GO:** Keep talking one-on-one and in groups. Assess whether the local's goals are still correct and clear. Evaluate whether new plans are needed.
13. **ORGANIZATION IS EVERYTHING:** Local-building will succeed better with the organization you provide as a local leader, so use the tools in this manual to help get the job done.
14. **EYES ON THE PRIZE:** Step back, look at the big picture, and don't let setbacks discourage you for long. Remember, you are part of a much bigger movement.

## Objectives of this local building manual

This manual is a guide for RVPs as they support building and maintaining strong locals within their region. It has been written to:

- define what makes a strong functioning local.
- clarify roles and responsibilities for RVPs, other Provincial Executive members, staff representatives, or representatives in local-building.
- build RVP skills and understanding of tools to:
  - identify local-building priorities;
  - develop, execute, and review local-building projects;
  - effectively communicate and engage with local leaders and members; and
  - support and encourage local member participation.



# Strong Locals

## What makes a strong local?

Use this checklist to look at the qualities and actions that make locals work well – and what makes them work even better.

The checklist will help you assess where locals are at, and where they could be. The goal, over time, is for all locals to work even better.

The checklist is not meant to be rigid, and it's not a step-by-step progression.

For example, a local might not have a shop steward structure in place, which is a quality of a local that works well, but it might be very active in the Red Dress Campaign, a quality of a local that works even better.

Each local has its own strengths and challenges. Priorities for change will flow from the local's current realities.

## Strong locals involve and engage members

Strong locals are:

- open, welcoming, and inclusive;
- democratic and accountable;
- skilled in two-way communication between local executive and members; and
- creative in finding ways to increase membership participation.

Locals that work well:

- welcome and orient new members to the union;
- hold regular membership meetings;
- communicate regularly with members – face-to-face communication is a priority; and
- circulate educational and other opportunities, and encourage members to attend.

Locals that work even better:

- educate, train, and mentor members, especially youth, to grow their skills and develop as leaders;
- reach out to members from equity-deserving groups, younger members, different occupational groups and all the groups that make up multi-employer locals;
- seek out members' ideas for making meetings appealing and accessible, and survey members on their interests and skills;
- find creative ways to engage members, such as cultural activities, environmental or literacy projects, celebrations and socials that involve members' families;
- send full delegate complements to educational workshops, regional meetings, bargaining conferences and the HEU convention; and
- engage the members in broader HEU campaigns and political actions.

### **Strong locals provide good leadership**

Strong locals have leaders who:

- work as teams, and continually renew themselves;
- responsibly handle financial and other local affairs;
- communicate regularly and consistently;
- value education and leadership development; and
- walk the talk of diversity, equity and inclusion.

Locals that work well that:

- have a full complement of trained leaders – executive committee members and a chief steward, as well as enough stewards, joint occupational health and safety committee (JOHSC) members or worker health and safety representatives;
- hold regular meetings of the executive, stewards, and committees;
- have leadership teams who communicate well internally as well as with each other;
- decide by consensus and listen to minority viewpoints;
- collaborate well with servicing representatives and regional vice-presidents;
- engage members to participate, discuss, and approve how their local rebates are spent; and
- file quarterly financial reports.

Locals that work even better:

- consider the union's strategic directions in decision-making;
- are involved in the union regionally and provincially;
- continue to build their leadership capacity through training and education;
- recruit, develop, and mentor new leaders and youth;
- consider equity and diversity in everything they do – from communications, events and meetings, to deciding on priorities and strategies, from attendance at conferences to participation in educational workshops;

- have leadership that reflects the diversity of the membership;
- have clearly defined local by-laws which direct local spending and procedures fairly and consistently;
- develop a budget based on spending approved in the by-laws and expected expenses for the year;
- fulfill administrative responsibilities (i.e. keep sign-in books updated, annually review by-laws, send minutes and contact information to Provincial Office);
- delegate tasks and share responsibilities among the leadership team and with other members; and
- handle conflict in early stages and view it as a positive opportunity to build relationships and engage members in the union.

## **Strong locals defend members' rights and resolve disputes**

Strong locals:

- solve problems and grievances effectively;
- focus on member workplace concerns and issues;
- make health and safety a priority; and
- ensure those who need to know, including members, are kept informed.

Locals that work well:

- process grievances effectively;
- conduct health and safety inspections;
- work closely with servicing representatives; and
- communicate regularly about grievances and health and safety issues to keep leaders and staff in the loop.

Locals that work even better:

- let the members know about grievance outcomes and monitor success;
- hold regular meetings of steward teams, health and safety committees, and labour-management committees – and keep minutes;
- resolve health and safety issues;
- know their role and the employer's role in member-to-member conflict situations – and what to do when it's the union's responsibility to resolve them; and
- celebrate the role of stewards at local events.

## **Strong locals are active in union and community campaigns**

Strong locals:

- promote the union's campaigns to defend public health care and workers' rights;
- are active on social justice and other important community issues;

- communicate to the members regularly about HEU campaigns and other issues that affect them;
- develop activism through membership education and training on community issues; and
- educate members about the issues and encourage voting in civic, provincial and federal elections.

Locals that work well in campaigns are locals that work even better when they:

- participate on labour councils and in the local labour movement;
- are active and involve members in broader union campaigns;
- volunteer and encourage other members to volunteer in political campaigns; and
- have strong community connections and work with allies including, school boards, health authority boards, goodwill committees, Council of Canadians, BC Health Coalition. Locals can also connect on issues such as the Red Dress Campaign or International Women's Day march.



## Assess and Prioritize

Each local is unique, and dynamics can change quickly as officers and activists gain training and experience.

Some locals are brand new and need support to build from scratch, while others are very well-established. Some locals may also want to review and renew how they do things.

This will be a team effort from the initial assessment and prioritization of locals in your region, to implementing the local-building plans for your “target locals”.

RVPs, staff representatives, and others will work together with you to provide necessary support and resources. Staff representatives are also a great resource for identifying activists and assisting with your local-building plan.

### Assess locals in your region

Each local requires a different approach, using different tools and a variety of resources to reach their goals.

We will start by identifying the individual needs of each local in your region, and then we’ll prioritize which ones need local-building work.

### Prioritize for local-building

Once you have completed your locals’ assessments and have a general understanding of how each local is functioning, work with your regional servicing director to update your local assessments.

Then, work together on identifying the levels of support each local requires. You may consider the locals in your region on a one-to-four scale:

1. **HIGH-FUNCTIONING:** Listen to what members are saying. Help them find their voice to share their own ideas. Don't just let them gossip or gripe – instead, guide them to focus on concrete problems that can be solved.
2. **NEEDS SUPPORT:** This local works well in some areas but could use some support in getting to the next level.
3. **POOR-FUNCTIONING:** This local has an elected executive, but does not engage or support members, has little to no leadership, and is not active in the union or community.
4. **NON-FUNCTIONING:** This local does not have an elected executive and is not active in any way.

Consider starting small to gain experience, even begin with your own local. You may want to focus first on locals that need specific support in areas you are familiar and comfortable with.

Most likely, you will have the most success and impact by focusing on those locals that need support, but be sure to keep your focus on a maximum of three “target locals”.

Locals that are poor-functioning or non-functioning will require more complex resources and support, and should only be done in collaboration with the servicing representative, the regional servicing director and HEU president.

Once you have identified up to three “target locals”, reach out to the executive to initiate local-building discussions.

Begin by proposing an action plan that includes arranging a meeting with local executives and activists to discuss the challenges they are facing, ideas they have for increasing member engagement, and share the local-building tools in this workbook.



# Local Assessment Agenda Template

You may not have time to cover the entire agenda in one meeting. Try to complete **Identify Building Priorities** in the first meeting and follow up with a second meeting to **Establish Realistic Goals and Actions**.

## 1. Introductions

- a. Introduce yourself, your role.
- b. Ask executive members to introduce themselves and their position.

## 2. Goals for the meeting

- a. Share your goal for the meeting to help the local:
  - i. assess their current status;
  - ii. identify building priorities; and
  - iii. establish realistic goals and actions.
- b. Ask all executive members to share their goals for the meeting.

## 3. Local assessment – how well is the local functioning?

- a. Ask the executive the following questions and note the responses:
  - Does the local have a full executive?
  - Does the local have a full and functioning shop steward team?
  - Does the local have a full and functioning OH&S team?
  - Are motions adopted and recorded properly?
  - Does the local have Provincial Executive-approved by-laws?
  - Are the local's finances in order and Quarterly Reports up-to-date?
  - Does the local have regular membership meetings?
  - Is quorum reached regularly?
  - Is there participation from various sites? (if there are multiple sites)
  - Is the local sending delegates to participate in regional meetings, conferences, workshops and conventions?

## 4. Identify “building priorities” – identify priorities for the following four areas:

- a. Involving and engaging members.
- b. Providing good leadership.
- c. Defending members' rights and resolving disputes.
- d. Activism in union and community campaigns.

## 5. Establish realistic goals and actions

- a. Review the building priorities list and identify one to three overall goals for each area.
- b. Decide on the actions needed to attain each goal.
- c. Assign someone to follow up on each action.



# Communicating and Engaging with Locals

## COMMUNICATIONS AND MEETINGS

For every step of the local-building process, effective communication is needed. You may use the communication tools in this section to talk to representatives, local executives, activists, and others, to:

- assess which locals you will help and identify their strengths and challenges (*see Section 2: Assess and Prioritize*);
- come up with priorities and an action plan (*see Section 4: Create a Plan*);
- follow through and execute the plan (*see Section 5: Take Action*); and
- review the success of the project and lessons learned.

Whether it is through elections or conferences, regional meetings or workshops, or just reaching out by email, text and phone, you can start having the conversations about where the local is at and how you can assist them.

### i. Meet with the local

As part of the planning phase, RVPs, representatives and other identified resource people should meet with the local executive and activists. Use Zoom as much as possible during the organizing phase. Make sure to fill out the *Local Meeting Report* (*see 5Q – Worksheet – Local Meeting Report*) after each meeting.

Actively listen to their views and their local union issues. Being truly heard is the foundation for building the plan.

### Tips for active listening

- Pay attention. Listen to the words, the tone and the body language.
- Listen more than you speak. Give lots of space for members to be heard.
- Listen for readiness and potential.
- Probe and clarify with open-ended questions. “Initial thoughts?” “What is working well?” “What could be improved?”

### If there’s resistance

- Keep listening, ask more open-ended questions.
- Allow some silence to give space and help diffuse tension.
- If necessary, end the meeting, but be positive: “I appreciate your honesty and willingness to talk about the issues.”
- Say you’ll be back in touch in a while.

## ii. Preparing for a local-building meeting

### Ahead of time

- Always contact the appropriate representative. Discuss the presentation to determine who is doing what and who will answer specific questions. Remember that specific servicing or collective agreement issues will be dealt with by the HEU staff representative.
- Confirm the meeting time and location (or Zoom link if online).
- Confirm that the representative has notified the local you’ll be there.
- Confirm which collective agreements cover local members.
- Confirm the amount of time on the agenda for your presentation. Make sure there’s time built in for questions and discussion.
- Review communication tips for meetings and how to have one-on-one conversations (*below*) and use them to get organized and prepare your comments.
- Check your email and text messages daily for any updates about the meeting.
- If you can’t attend the meeting for some reason, contact the representative directly.

### Gather resources

- Bring any materials that will help answer questions.
- Bring the HEU *Constitution and By-Laws* and HEU *Policies and Procedures* manual to consult, if necessary.
- Have the HEU president and financial secretary contact information available for follow up on financial or constitutional issues.

### After the meeting

- Complete the *Local Meeting Report* and send to the president, staff representative, and regional director.

### iii. Communication tips for meetings

Here are some tips to help make the most of your local-building meetings:

#### 1. Before the meeting: get organized

- Think about the people you'll be meeting with and how they might react.
- Be clear about the purpose of the meeting:
  - assess the needs and strengths of the local;
  - listen to their views and local union issues; and
  - assure them you will work together and support them to identify available resources and create an action plan as they build a strong local (*see Section 5: Take Action for ideas for solutions and resources that can be offered*).
- Think about what outcome you want to achieve (such as agreeing they need an action plan to build the local union or committing to specific follow up to get the planning process moving, etc.).
- Prepare any materials you will be distributing.
- Have a contact sheet (*see Section 3: Contact Sign-up Form*).

#### Prepare your presentation

These are some suggestions for things you might say. They're not meant to be a script for you to follow – every local situation and its issues will be different. Make sure to practice what you'll say.

- Why you're meeting and why it's important to the local:
  - "I wanted to meet with you to talk about HEU's focus on building stronger locals and how it can support you to deal with some of the challenges you're facing as leaders."
- Tailor what you say to the local's reality. For example:
  - "This is a great opportunity to get resources to help the local fill executive positions and get people trained."
  - "I know you've been trying, and it's hard. The union will help you find ways to get more members out to meetings – you won't be alone."
- Prep some open-ended questions in advance:
  - Specific: "What's working well in the local?" "What could be working better?" "What do you want to work on improving?"
  - General: "Why do you feel this way?" "What do you think we could do to deal with this issue?"

#### 2. In the meeting: make it a two-way conversation

##### Set the tone

- Be confident, open and relaxed.
- Make eye contact with everyone.
- Stay positive and supportive. Your good energy can prevent negativity.
- Be brief. Give lots of space for others to speak.

## **After you've spoken**

- Ask for their initial thoughts about local-building.
- Find out what they think is working well and what could be improved.
- Suggest ways to start a planning process. Ask for their suggestions, comments, questions, and who will be involved.
- Identify support and resources.

## **Move to action**

- Ask for a commitment to specific things to start the planning/building process.
- Record contact info so you can communicate and build on this meeting.
- Be clear about follow up: what are next steps, timelines, who is responsible for what?
- Be clear about what you are committing to do.

## **3. After the meeting: reflect and follow up**

- Was there anyone at the meeting who could potentially lead the planning process?
- Were there any obstacles that need to be addressed right away? How might they be dealt with?
- Are there any local strengths that could be potential starting points for local-building?
- Enter your contacts and assessments in a central place.
- Communicate what happened to the staff representative, if you are an RVP.
- Follow through on your commitments.

## **iv. One-on-one conversations**

Local leaders and members are unlikely to get involved in local-building unless you encourage them to do so by talking one-on-one in person, by text or in a telephone call. One-on-one provides an opportunity to convey and clarify information and – most importantly – get feedback, answer questions, and hear what people are thinking about.

Personal relationships build union solidarity, strength and power!

## EXAMPLE CONVERSATION

01

### INTRODUCTION

Get the person's attention, show why the campaign is important.

“

**Local building is a way to get resources and support to deal with the issues that you care about.**

03

### ASK QUESTIONS AND LISTEN

Find out what they care about, and what's important to them.

“

**I know you've been working hard to move the local forward. What could make things work even better? What would help you in your role as a leader?**

04

### CONNECT LOCAL-BUILDING AS A SOLUTION

Be specific about how local-building will help the local.

“

**The union is really committed to working with you on these issues. Let's work together on a plan and get you the support you need to put it in motion.**

05

### MOVE THEM TO ACTION!

Explain why committing themselves to local-building matters. Be direct in asking them to commit to taking action, and be specific about what you are asking them to do.

If the answer is “no”, find out why, listen and return to the issues mentioned earlier. If they are still reluctant, ask them to think about what you've said and agree to talk again.

“

**Will you come to a meeting to talk about the next steps? It could make a big difference to helping you in your role, to the members and the local's future.**



# Create a Plan

## COMMUNICATIONS AND MEETINGS

For each prioritized “target local”, please make use of the following steps to create a plan. To assist you with completing these steps, you may need to refer to the guide for communication and engagement with locals found in *Section 3* of this manual.

Once you have agreement to initiate a local-building meeting, find a time and date for the session in-person, by Zoom or over the phone with the executive or activists, the staff representative and RVP. Together, make use of the local team performance inventory worksheet from *Section 1* of this manual.

Ask each person in the meeting what they feel are their local’s biggest strengths, and what they feel are their biggest weaknesses as a local. Ask them to write down their top weakness and top strength, before asking them to read each out starting with strengths. This will help with getting buy-in and provide an early opportunity to make them feel heard.

### i. Identify building priorities for the local

From *Section 4’s Local-Building Plan Worksheet: Step 1*, identify the priorities for the local plan as they apply to these four areas:

- involving and engaging the members;
- providing good leadership;
- defending members’ rights and resolving disputes; and
- activism in union and community campaigns.

The local might not have priorities in all of these areas, but only in one or two, and that's okay.

You may use the *Strong Local Check List* from *Section 1* to prompt ideas and conversations.

### Example

You are thinking about identified priorities for “involving and engaging the members.” You know your local schedules regular membership meetings, but there is very low attendance at the meetings and quorum is hard to reach. In the priority box, you could write, “Find ways to motivate members to come to the meetings.”

## ii. Establish realistic goals and actions

Now that priority areas have been identified, our job is to help the executive create a pathway to achieving their goals.

On the *Local-Building Plan Worksheet: Step 2*, convert your priorities into goals and actions.

- Review the priorities from *Step 1* and identify your top three priorities across the four areas by asking each person to place an asterisk beside them. Please make sure they only vote three times for three priorities total, not three from each area.
- Transfer the three highest-ranked priorities to each of the priority detail pages, stated as a goal.

### Example

A listed priority is “Make sure executive members are clear on their roles and responsibilities.” A goal for this priority might be “Ensure executive members receive training within the next six months.”

- Decide on the actions needed to attain each goal. Make the goals and actions specific, measurable, realistic, and time-bound (*see SMART goal graphic below*).
- Assign someone to follow up on each action. Determine any resources needed, and a timeline for each action.
  - Include the RVP's role and responsibility for the actions in the plan. These should be specific, such as helping to recruit members to help with the priority areas, talking with members, etc.
  - Identify any other HEU supports needed (i.e. involvement of representative, organizer, vice-president, financial secretary, president, etc., or any other resources or funding).

Check out the sample *Local-Building Worksheet* in this section for an example of how to complete the plan.

You will want to work collaboratively with the local in building the plan to best communicate and engage members as outlined in *Section 3*.

The graphic illustrates the SMART acronym for goal setting. It consists of five columns, each representing a principle. Each column has a large colored circle with a white letter, a small icon, a colored rounded rectangle with the principle name, and a short paragraph of explanation.

<b>S</b>	<b>M</b>	<b>A</b>	<b>R</b>	<b>T</b>
				
<b>SPECIFIC</b>	<b>MEASURABLE</b>	<b>ACTIONABLE</b>	<b>REALISTIC</b>	<b>TIMEBOUND</b>
Be clear and specific so your goals are easier to achieve. This also helps you know how and where to get started.	Measureable goals can be tracked, allowing you to see your progress. They also tell you when a goal is complete.	Are you able to take action to achieve the goal? Actionable goals ensure the steps to get there are within your control.	Avoid overwhelm and unnecessary stress and frustration by making the goal realistic.	A date helps us stay focused and motivated, inspiring us and providing something to work towards.

### iii. Submit the plan

After you have completed the plan, please fill out the *Local-Building Plan* form, attach the plan, and submit it to the president. Be sure to attach any additional local information that may be needed.

## Example: Local Building Worksheet

**Priority #1** Recruit new JOHS committee (JOHSC) worker representative

---

**Goal** 1 new JOHS committee worker representative in place and trained within the next 6 months

---

### Actions (How you'll get there)

1. Select an executive member or steward to work on this priority.
2. Arrange a meeting with the JOHSC worker representative who is stepping down to discuss how they could help recruit a new representative.
3. Arrange walkaround to speak one-on-one with members about occupational health and safety (OH&S) issues. Ask members if they are interested in getting involved.
4. Highlight an OH&S issue at next general membership meeting. Talk about important role of JOHSC worker representatives, and ask members to volunteer, if interested.

### Roles (Who will follow up and how)

1. Chairperson will put on agenda and speak to the issue at next local executive meeting.
2. Member selected to work on this will call JOHSC worker representative to arrange meeting.
3. Member who is working on this will identify others who could be involved (possibly stepping down JOHSC representative), identify areas that have recently had safety concerns as a starting place.
4. Secretary-treasurer to:
  - email local executive and steward team for suggested OH&S issue;
  - call staff representative/Provincial Office OH&S representative for suggestions and any materials that could be used; and
  - prepare presentation for meeting.

### Resources needed

1. N/A
2. Contact information, i.e. phone numbers, email addresses.
3. Minutes of last few JOHSC meetings. Create a document to track who has been spoken to.
4. N/A

### Timeline

1. Next local executive meeting.
2. Within the next two weeks.
3. N/A
4. N/A



## Local Building Plan Priorities Worksheet: Step 1

Please see the *Strong Local Check List* for areas to consider.  
Be specific in listing the priorities.

### Area 1: Priorities for involving and engaging the members

### Area 2: Priorities for providing good leadership

### Area 3: Priorities for defending members' rights and resolving disputes

### Area 4: Priorities for activism in union and community campaigns

## Local Building Plan Priorities Worksheet: Step 2 – Priority Detail

**Priority #1** (what is needed)

---

**Goal** (where you want to be)

---

**Actions** (How you'll get there)

**Roles** (Who will follow up and how)

**Resources needed**

**Timeline**

**Priority #2** (what is needed)

---

**Goal** (where you want to be)

---

**Actions** (How you'll get there)

**Roles** (Who will follow up and how)

**Resources needed**

**Timeline**

**Priority #3** (what is needed)

---

**Goal** (where you want to be)

---

**Actions** (How you'll get there)

**Roles** (Who will follow up and how)

**Resources needed**

**Timeline**



## Local Building Planning Form

Please submit completed forms to [bnederpel@heu.org](mailto:bnederpel@heu.org)

**Date:**

**RVP:**

**Local:**

**Local Chairperson:**

**Servicing Representative:**

**Director:**

### How well is the Local Functioning?

- Full executive?
- Full and functioning shop steward OHS team?
- Full and functioning OHS team?
- Motions adopted and recorded properly?
- PE approved by-laws?
- Finances in order and Quarterly Reports up to date?
- Have regular membership meetings?
- Quorum reached regularly?
- Participation from various sites?
- Delegates participate in regional meetings, conference, workshops and conventions?

**What are the other challenges that the Local is facing** (include Rep's comments)?

**Plan** (include any additional travel requirements, resources and people required below):

Full executive?



# Take Action

## TAKE ACTION: OVERVIEW

In this section, you'll find resources for various kinds of actions that can be taken to fulfill the goals in the local plan.

Remember, it is always the local that is doing the building. To build a movement, we empower local activists who empower local members. **Your job is to move the executive to action by:**

- identifying timelines and next steps in collaboration with the local activists;
- identifying strengths and leverage these to get results;
- recruiting natural leaders to build a bigger team;
- getting commitment of local activists on actions;
- form working groups; and
- be clear on what you are committing to and do it. But don't make promises you cannot keep!

### i. Resources

When working with the local, you can help identify available resources they can use, such as:

- chairperson's manual, secretary-treasurer's manual
- HEU *Constitution and By-Laws*
- policy and procedures manual
- recent issue of the *Guardian*
- HEU communications bulletins
- business cards
- various applications for workshops, union events and member-support funds (such as the FBA Education Fund)

These resources can be printed off from the website or ordered from the mailroom.

## ii. Actions

You can also facilitate the executive in finding solutions, such as:

- focus on list-building and communicating to members on the list;
- map the local and identify potential activists to engage;
- strategize ways to get members to meetings to achieve quorum;
- create local by-laws to reflect member priorities and procedures;
- organize a local-building engagement event;
- apply to the local project fund for HEU funding and support;
- send members to education opportunities;
- address causes of interpersonal conflict and seek mediation where necessary;
- use technology to enhance local meetings;
- make use of simple techniques to engage on the shop floor;
- get guidance for newly certified and merged locals; and
- apply for support for small- and medium-sized locals.

The following sections provide more information about the action above.

## MEMBER CONTACT LISTS

Building and maintaining a contact list with emails and mobile phone numbers is one of the best ways to keep in touch with members. You can mobilize members to action, invite them to meetings, and keep them informed.

### List-building

When possible, it is always better to have members' contact details, particularly their email address and mobile phone number, to send them information, rather than just giving them a leaflet or a link. This way you can communicate more frequently and send reminders.

- Walk around your facility with a clipboard or throw an event to get members to sign-up for the list on the spot.
- Introduce yourself to members as the shop steward or chair, hand out collective agreements and ask to add them to the contact list for bargaining, meetings and educational opportunities.
- Hand out swag in exchange for a sign-up or enter to win something exciting. Gift basket of HEU swag, or local businesses often love to donate things for health care workers, etc.
- Make sure to keep up-to-date contact information.
- Use the **Contact Sign-up Sheet** and send a copy to the Provincial Office.

### Contact campaigns

Make being on the contact list worthwhile! You may think about this as a gift to the members – what will they appreciate receiving in the emails?

- Send only relevant information to members – i.e. executive contact information, meeting times and places, important decisions and updates on workplace issues.
- Include interesting or inspiring content, such as videos and images.
- Include useful content, such as info about relevant protocols.
- Pick only one to three “calls to action” – i.e. an item they can click, an invite to a meeting, etc. People will lose attention, if you ask for too many things.
- Keep messages – email or text – short and to the point.
- Consider sending text messages for more personalized calls to action.

## Email tips

Members really appreciate getting good information about their union and the work it does.

So, make sure you strike a balance with your emails to members. Be careful not to send too much information or inappropriate/irrelevant content.

- Keep the list confidential and use it only for union business, so no sharing of the list with third-parties and never give out personal email addresses to other members of the local – ever.
- Do not use the list for personal causes such as a particular member’s favourite charity fund-raising drive or other personal issues.
- Use the information sparingly and establish a schedule for regular emails – once per week, every two weeks, or even once a month, depending on what information you want to send.
- Your email messages should include links back to your HEU website or social media pages where the member can get more information, or more frequent updates.
- Make sure the subject line is clear and that messages are brief and to the point.
- Ensure your message has no errors or typos.
- Say hello and tell them who you are by using a salutation and closing with a signature that includes your own contact information.
- Remember, email communication is not private, and your message can be forwarded to any other party.
- Be careful to never reply to all.



## HEU Contact Sign-Up Sheet

This information is being collected to communicate union information and activities to HEU members.

### CONTACT

**First Name:**

**Last Name:**

**Email:**

**Cell Phone:**

**Cell Phone:**

**Landline Phone:**

**Work Site:**

**Address:**

**City:**

**Postal Code:**

**Employer:**

**Job Title:**

### CONTACT

**First Name:**

**Last Name:**

**Email:**

**Cell Phone:**

**Cell Phone:**

**Landline Phone:**

**Work Site:**

**Address:**

**City:**

**Postal Code:**

**Employer:**

**Job Title:**

### CONTACT

**First Name:**

**Last Name:**

**Email:**

**Cell Phone:**

**Cell Phone:**

**Landline Phone:**

**Work Site:**

**Address:**

**City:**

**Postal Code:**

**Employer:**

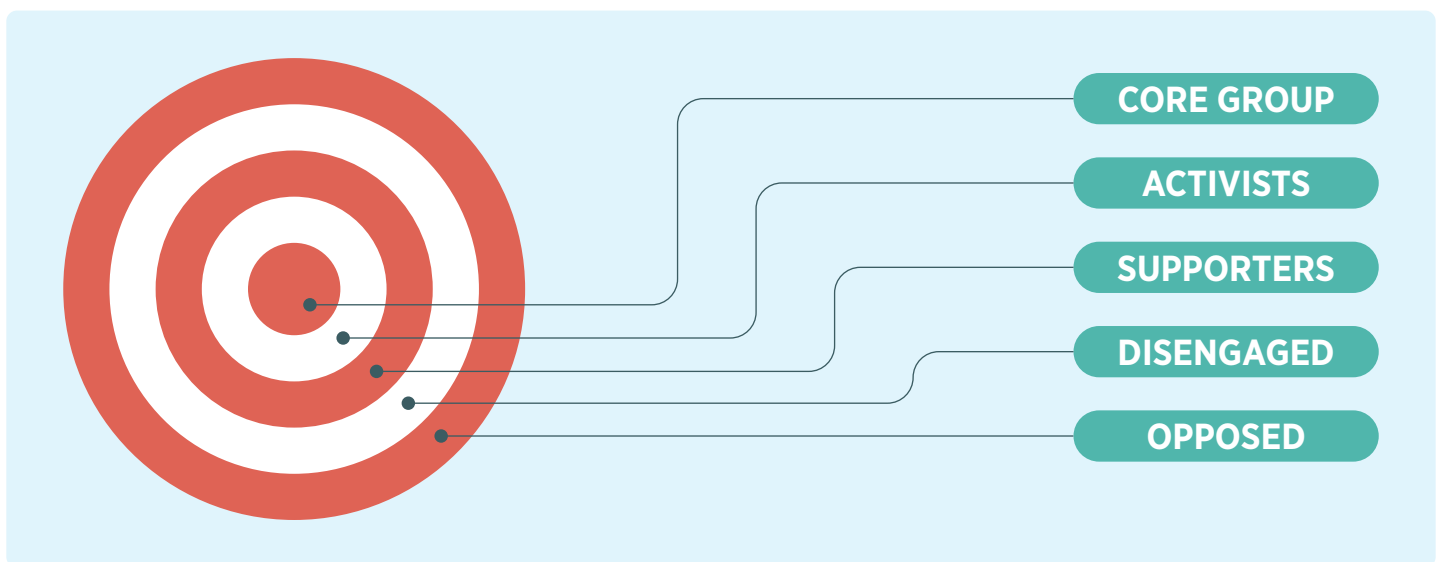
**Job Title:**

## MAPPING THE LOCAL

Your workplace may feel disorganized, but the truth is there is a lot of organization already in place – it’s just not necessarily connected to the work of the local. For example, members are in carpools, or family groups, or involved in some social activity together.

In this section, you can begin identifying members who are most likely to connect to the work of the local. And then, you can extend that work to define the groups that already exist in your workplace. These member identification exercises are called mapping.

Mapping is a systematic approach for identifying groups of members in a local and their level of support for the union. By undertaking a mapping exercise, you will have more information about the best individuals to bring into your union network.



### Engagement bullseye

Your first step in mapping is to assess members of the local using the following categories:

1. **CORE GROUP:** These members are always thinking about organizing and how to get others involved, even on their time off. They might be elected leaders or shop stewards, or not.
2. **ACTIVISTS:** These are members who can be counted on to help when an issue heats up. They will take responsibility getting the word out and asking others to also act.
3. **SUPPORTERS:** These members will wear a button or sign a petition, but don't take responsibility for getting anyone else involved.
4. **DISENGAGED:** These people don't see the union as a factor in their lives, so they don't participate.
5. **OPPOSED:** These members aren't just uninvolved, but they oppose the work of the union.

## Chart your members

When you begin your assessment, you should consider putting this information into a tracking chart. Tracking charts are easy to update and help you monitor your organizing progress and see where the gaps are.

Keep it simple. Create a spreadsheet, using a computer program such as Excel or Google Sheets.

Enter one row for each member, even people you don't have much information about.

Make a column for each bit of information you want to track, such as:

- First name
- Last name
- Support level (1-5)
- Cell phone
- Email address
- Job title
- Work area
- Shift
- Date of hire
- Actions taken (i.e. came to local meeting in past year, signed Care Can't Wait petition)
- Natural groups membership (*see below*)

Keep it updated. Charts are only as useful as they are accurate.

Continually update it and enlist co-workers to help. This can include filling in gaps in contact information, adding people who are missing from your list, and removing those who have quit, gone on leave, or changed assignments.

First	Last	Work Area	Job	Shift	Cell Phone	Email	Wage	Steward	Safety petition 10/31	Grievance training 11/10
Wanda	Smith	X-Ray	Tech	Day	123-456-7890	ws@mail.ca	\$15.02	X	X	
Jordy	Ali	Med Rec	Clerk	Eve	123-456-7890	ja@mail.ca	\$17.02		X	X

## Mapping natural groups

Alternatively, or in addition, you may want to map out natural groups within the local. This will help you get a better understanding of how the members are already socially organized. Use the *Mapping Groups Worksheet* in this manual to organize this work.

1. **IDENTIFY THE GROUPS:** The local executive can go through the departments, one by one, to brainstorm which groups they see, including any groups that cross departmental lines. Consider who talks to whom, who identifies with whom, who has coffee together, etc. They may be organized by department, job classification, physical area, cultural group, or some other way.
2. **ASSESS THE GROUPS:** For each group, identify:
  - Number of members (you may have to estimate).
  - The group's overall support of the union (strong, moderate, weak).
  - Job titles of members, and how many members in each.
  - Any union activists and core people in the group, including their name and contact information, and how much influence they have in the group (high, medium, low).
  - Any "natural leaders" who are not union activists. This is simply someone who has influence in the group. Note whether they are supportive, neutral, or hostile toward the union.

You can then use this information to strategically organize local campaigns and projects. For example, you can reach out to strong supporters who have influence on groups that you want to reach.

You can also identify priority groups to engage with. And be sure to list all the groups a member belongs to on your tracking chart, if you have one.



## Natural Leaders

Name	Job title	Phone	Email	Support of union

## Other comments

## **PARTICIPATION IN LOCAL UNION MEETINGS**

There are many creative ways for locals to encourage members to attend union meetings. Each local and its membership are different. Encourage locals to experiment to see what works.

Here are some ideas:

### **Get your meeting invitation noticed:**

- Walk around facility to personally invite members to the meeting.
- Think “click bait” for the local meeting notice and email subject lines to grab their attention.
- Set up a local Facebook page and create an event for the meeting.
- Send out meeting reminders the day of the meeting.
- Map your local to identify and develop communication networks, and to identify natural leaders in the workplace who can help promote the meeting.
- In your meeting invite, post or send the links to useful/interesting HEU videos, such as “*Your Union in Two and a Half Minutes*” or one of the many equity videos.

### **Make the meeting accessible:**

- Provide dependent and child care options.
- Provide the option of a hybrid meeting so they can attend online, as well as in-person.
- Distribute a membership survey to determine the day, time and location that works best for most local members. Consider changing or alternating times and locations.

### **Provide incentives to attend:**

- Provide refreshments and food at the meeting in a safe manner.
- Have draws or door prizes. The HEU Store has excellent items that also promote union pride.
  - Bring a co-worker, get an extra ballot in the draw.
  - First time? Here’s an extra ballot.
  - Answer an HEU trivia question correctly, gain an extra ballot.
  - Attend three meetings in a row? Here’s an extra ballot!

### **Make the meeting worthwhile:**

- Commit to running a smooth and efficient meeting.
- Remind members about question period.
- Hold special celebrations, bring in cultural entertainment and food, or highlight an occupation or department.
- Invite guest speakers to share information about:
  - a common collective agreement issue where a representative can explain what the language means and how to enforce it;
  - a local issue to organize around;
  - updates on union activities and issues from Provincial Executive members;
  - bargaining updates;

- experts on pensions, the Municipal Pension Plan, the Canada Pension Plan;
- international solidarity, global justice, human rights;
- community leaders, events and activities; and
- municipal, provincial or federal politicians.



## Local Meeting Agenda Template

**Name of Local:**

**Agenda Date:**

- 
- Call to Order
  - Indigenous Land Acknowledgement
  - Roll-Call of Officers
  - Equity Statement
  - Initiation of New Members
  - Reading of Minutes
  - Correspondence
  - Treasurer's Report (Revenues and Expenses)
  - Trustees' Report
  - Report of Delegates and Committees
  - Unfinished Business
  - Elections and Installation of Officers
  - New Business
  - Good and Welfare
  - Question Period
  - Adjournment

## What's in an agenda?

Your meeting's agenda has the following 16 items for your local to address in the order outlined below.

1. **CALL TO ORDER**
2. **INDIGENOUS LAND ACKNOWLEDGEMENT:** To ensure that we are actively participating in Reconciliation, the chairperson will take a moment to acknowledge the Indigenous lands on which they are hosting the meeting. To find out the territory you're on, check out this link: [www.native-land.ca](http://www.native-land.ca).
3. **ROLL-CALL OF OFFICERS:** The secretary-treasurer will list the executive members, and those in attendance will identify themselves as present. If an executive member has sent regrets that they are unable to attend, it will be noted at this time (i.e. "Sister Jane has sent regrets as she is on vacation.").
4. **EQUITY STATEMENT:** The *Equity Statement* is to be read out by the chair at the beginning of all local meetings to set the tone of respect and inclusion. You can find this in the *Membership Meeting Reference Manual*.
5. **INITIATION OF NEW MEMBERS:** The conductor leads the initiation of members who have not yet attended an HEU meeting (*Constitution and By-Laws*, Article 18, or in the *Membership Meeting Reference Manual*).
6. **READING OF MINUTES:** The secretary-treasurer reads the minutes from the previous meeting, which covers a brief description of the items discussed and clearly stating the motions that were made, amended, referred, tabled, accepted or defeated. Amendments can be made by members if the minutes are inaccurate, and the document is adopted into the local's permanent record.
7. **CORRESPONDENCE:** A list of all correspondence received by the local can be read out by the secretary-treasurer. Items of particular interest and those requested by the members can be read out in full, with discussion, questions or comments, and copies of the correspondence can be requested by the members either in digital or photocopied format, as well as being posted to the union board.
8. **TREASURER'S REPORT (REVENUES AND EXPENSES):** The secretary-treasurer will report on the financial statement, outlining the rebates received by the local and a list of the expenses paid out. All expenses need to be supported by a standing motion or a previously passed motion. A reconciled bank balance is also required.
9. **TRUSTEES' REPORT:** The senior trustee, or other trustee if the senior trustee is not present, should give a report on when the last quarterlies have been signed off and report on any findings.

10. **REPORT OF DELEGATES AND COMMITTEES:** Members who have attended union-related workshops or events should report to the meeting about their experiences and any necessary follow-up. Local committees report on previous or upcoming items and introduce motions as necessary. If there is a Provincial Executive member or staff representative present, they can provide a report at this time.
11. **UNFINISHED BUSINESS:** Items that have been on previous agendas are carried over each month until they are completed and reported on.
12. **ELECTIONS AND INSTALLATION OF OFFICERS:** Elections are held for new executive members, for delegates to bargaining conferences, and various conventions.
13. **NEW BUSINESS:** New items can be added to the agenda from various sources:
  - the executive meeting held prior to a local meeting;
  - chief shop steward, committee chairs and local members can submit agenda items or topics; and
  - upcoming events, issues, campaigns or educational opportunities highlighted in the correspondence from Provincial Office.
14. **GOOD AND WELFARE:** Executive or members can announce or have a general discussion about various items not necessarily relating to the local's operations.
15. **QUESTION PERIOD:** Members sometimes will have questions for the executive or guests, such as a Provincial Executive member or staff representative, that have not been covered under the agenda. If unanswered questions arise, it is important that the chair seek out the information from a reliable source and report back.
16. **ADJOURNMENT**

## **ADOPTING LOCAL BY-LAWS**

A good way to build a strong foundation for locals is to create local by-laws that define key principles and help locals stay organized and operating within the HEU *Constitution and By-Laws*. Local by-laws will help new local executives get acquainted with how the local operates and give them a starting point for their term after they are elected.

Locals should review their by-laws regularly to ensure they are clear, relevant, desired and do not contravene the HEU *Constitution and By-Laws*.

### **What are by-laws?**

By-laws are a list of standing motions at a local that allow them to operate within the HEU constitution, but still reflect the unique circumstances of the local. These local by-laws often develop one at a time over the years or can be introduced at a meeting as a set of by-laws within a single document that is debated, amended if necessary, and passed.

In either case, a local by-law must be introduced as a standing motion that the membership of the local approves. Every by-law **must operate within the HEU Constitution and By-Laws**.

### **Difference between a motion and a standing motion:**

- A motion is a one-time directive to the executive to do a task, take a position or to spend money.
- A standing motion (or by-law) is a motion that is intended to continue from the date of adoption. It should be written in a way that makes the intention clear and will stand the test of time. Once a standing motion is passed, it must be followed unless altered by a subsequent motion at a meeting with quorum.

## **Making by-laws**

If a local does not have existing by-laws, the local executive can draft by-laws and bring these to the membership at a local union meeting for approval.

- Review past minutes and identify existing standing motions.
- Compile the existing standing motions (with dates) into new by-laws.
- Conduct a review of the by-laws to determine if each standing motion is still clear, relevant and desired.
- Amend or delete standing motions as needed.
- Identify any gaps that need to be addressed.
- Introduce the proposed updated by-laws to the membership at a local union meeting.
- Approved and updated by-laws must be submitted to the HEU president and accepted by the Provincial Executive as meeting constitutional requirements.

## **Reviewing existing by-laws**

Local executives can review their by-laws for consistency and relevancy and may propose updates to the local membership at a union meeting.

- Review the local by-laws that the local has on file.
- Determine if there are standing motions that should be included in the bylaws.
- If the local does not have a copy of their by-laws, they can ask if Provincial Office has a copy on file.
- Check for items that may be out-of-date or require updating.
- Check for irrelevant or redundant by-laws.
- Introduce the proposed updated by-laws to the membership at a union meeting.
- Approved and updated by-laws must be submitted to the HEU president and be accepted by the Provincial Executive as meeting constitutional requirements.

## What to include in by-laws?

All by-laws should include:

- executive structure
- with addition or removal of positions from the standard nine positions outlined in the HEU constitution, such as site representative, equity representative, technical representative, outreach, etc.; and
- listed in order of how they would be elected.
- selection process for shop stewards and JOHS committee representatives;
- local election process which may include nomination period, method for the election, and campaign rules;
- meeting schedule, if they are not held monthly (excluding July, August and December, for example).

By-laws may include:

- meeting schedule, if they are fixed dates;
- membership and affiliations;
- the number of alternates who would fill vacancies until the position can be filled by election; and
- financial standing motions including annual donations (not to exceed the yearly rebate total).

**Note: The total local spending and donations outlined in the by-laws are not to exceed the annual rebates provided to the local and they must meet the spending guidelines as approved by the Financial Secretary.**

## HEU local by-law template

For the current local by-laws template, visit [heu.org/local-executive-documents](http://heu.org/local-executive-documents)

Please submit completed local by-laws by email: [localdocuments@heu.org](mailto:localdocuments@heu.org) or fax 604-739-1510.

## HEU local by-law example

**Executive structure: a local executive consists of the following:**

- Chairperson (Table Officer)
- Vice-Chairperson (Table Officer)
- Secretary-Treasurer (Table Officer)
- Assistant Secretary-Treasurer (Table Officer)
- Site Representative
- Senior Trustee
- Senior Trustee Elect
- Trustee
- Conductor
- Warden

The local elects up to three alternates to fill any temporary vacancies, excluding the chairperson, to be elected on one ballot, and the number of votes determine the order of alternates.

### **Shop Stewards, JOHSC and Worker Representatives**

- The local executive selects the chief shop steward, shop stewards, JOHSC members and worker health and safety representative(s) at the first executive meeting after the elections. Consideration will be made to ensure continuity, diversity and shared workload.
- The local executive will annually seek an expression of interest for the full-time chief shop steward with the minimum qualification of two years of steward experience and Level 2 shop steward training, where possible.
- If a steward's actions are deemed harmful, the local executive may determine a course of mentorship, retraining, and subsequent removal if not rectified. Immediate removal may be required in serious cases in consultation with the HEU staff representative.

### **Local elections**

- The local will conduct the executive elections by electronic ballot-box to conclude on the date of the regularly scheduled February meeting.
- Nominations will be open for a minimum of seven days.
- Electioneering:
  - any candidate who wishes to run for the local executive may provide a bio which will be included on the electronic ballot, may post their bio on the union board and local Facebook group. No other distribution of candidate materials will be allowed in the workplace.
  - each candidate is allowed up to two minutes to address the membership at the nomination meeting or at any meeting prior to voting.

### **Local meetings**

- The local meetings will be held at 4:30 p.m. on the second Tuesday of every month, excluding July and August when meetings will not be held.

## **HEU local spending example**

### **Local spending**

- The local may spend up to \$250 for HEU promotional materials and giveaways for the local's booth at the annual Labour Day Picnic.
- The local will give away two HEU Boutique products per local meeting as door prizes.
- The local celebrates HEU Day, which may include food, HEU Boutique items, and wage replacement for up to two people, up to a total maximum of \$1,000.
- The local may spend up to \$100 on food for each local meeting.
- The local may spend up to \$100 per month for meeting rooms.
- The local will purchase an annual Zoom subscription for up to \$200.
- The local may spend up to \$100 per month for office expenses, including internet.

- The local provides retiring members, who have attended 50 per cent of local meetings in the year prior to retiring, which may include three meetings and up to two letters, with a gift valued up to \$100.
- The local will send two additional delegates to the HEU regional meeting, covering necessary wage replacement, shared hotel, mileage, and per diem as per HEU policy.
- The local executive will introduce a budget based on expenses and guidelines arising from the local by-laws and foreseeable expenses for the year, at the regular February or March general membership meeting.

### **Membership and affiliation**

- The local will pay an annual membership fee and donation of \$100 to the BC Health Coalition.
- The local will continue to be affiliated to the District Labour Council and pay all dues. Four table officers are automatic delegates with remaining delegate allotments being decided by election at a general membership meeting.

### **Donations**

- The local will donate \$250 each year to the District Labour Council for the Labour Day picnic.
- The local will donate \$100 each year to the Council of Canadians' Annual Peace Walk.
- The local will donate \$500 for bursaries each year, which will be administered by the Provincial Office.

## **LOCAL-BUILDING EVENTS**

The goal is to create a local-building event that will achieve any of a combination of these four outcomes:

- help educate members about an issue or the union in general;
- engage and mobilize members on a campaign;
- identify possible activists and leaders; and
- gather contact information from members.

Local building events are not social gatherings.

### **Resources**

- HEU gear for handing out.
- Collective agreements, constitutions etc.
- Posters, printed handouts, and other notices from HEU's communications department.
- Branded tent from HEU regional offices.
- Various funds are available to cover costs, in part or in full.
- Specialist staff (e.g., a staff organizer).
- Door prizes.

## Process

1. Meet with representatives and others to discuss a rough outline of the issues, solutions, and what elements are needed at the event. Feel free to consult with, or include, the HEU president and financial secretary.
2. Submit a draft local-building plan to the president and financial secretary, who will respond within seven days.
3. Once a draft is approved, meet with the local executive or activists to discuss:
  - What is the goal of the event?
  - How will the event achieve that goal?
  - What resources are needed and who is responsible for applying and obtaining them? Are any resources outside of HEU required?
  - What is the proposed budget to cover all costs?
  - How can you make it fun? (theme, games, prizes, etc.)

## Submit

- *Local-Building Plan Form* submitted by the RVP.
- Application for *Local Project Fund* submitted by the RVP or local, if needed.
- Representatives to be responsible for gathering material resources (i.e. tent, collective agreements, bargaining bulletins, etc.).
- HEU president and financial secretary will consider the plan, assign resources, and respond as quickly as possible.
- HEU president will arrange for poster, handouts, email needs with timelines, and any other required communication staff resources.
- HEU financial secretary will organize swag and door prizes.

## Funding

1. Local rebates – The Local can hold a meeting, with quorum, to adopt a motion to spend their rebates and funding from the *Small- and Mid-sized Local Supplement* to spend on the event.
2. Local bylaws – A Local may have a by-law that allows them to spend a certain amount of money each year on a particular event or item. There should be sufficient details in the motion, including the maximum amount that could be spent and apply to repetitive expenses or events. The total spending in standing motions must never exceed the rebates received annually. The expenditures must be reported to the members at the next meeting.
3. Local budget – The best practice is a local that has an annual budget that is detailed and approved by members. A budget outlines the expected rebates to be received for the year, and the estimated expenses for each line items for the year, including events. Once a budget is approved by the members, the Local executive may spend as necessary as these expenses are pre-approved. Since this is an annual budget, if the local has excess money in the bank

that they want to use in the fiscal year, they can run a deficit budget unlike with standing motions.

4. Local Project Fund – The Local may apply to the Provincial Office for a cost share of the event or campaign and their portion of the expenses are paid from the Local rebates providing the expenses are approved, and pass a motion at a local meeting. Where a Local is having challenges achieving quorum or is lacking a full executive to get the Local approval, seek support from the HEU President and Financial Secretary for assistance.
5. Local building for PE member attendance – Where the event is part of an approved local building plan, the provincial office pays for the wages and expenses of the PE member. Otherwise, the local will need to include the expenses of the PE member (excluding the officers) as part of their application.

## Report

At the completion of the event, please submit a written report to the HEU president outlining what was achieved and the next steps for local-building.

## Event Example

The director, staff representative, RVP and HEU president met to discuss how to support the local. The representative had already made significant efforts to find new activists through every means possible. This was a critical effort that allowed for enough interest at the local level to build upon.

## Issues

- No local executive because members left to work at other sites, retired or burnt out.
- No shop stewards.
- Local meetings were disorganized – no structure, no agenda, long, focused on complaints and negativity.
- Unable to pass motions, access funds or submit quarterlies.
- Little engagement of members with any efforts made.

## Strengths

- Former executives would hold yearly HEU Day event with free hotdogs.
- Held Zoom meetings and have computer equipment.
- It has a Facebook page with good and creative content.
- It has a fair amount of member contact information.
- Paid shop steward days.
- Representative had made exemplary efforts to find and engage with new activists.
- Has by-laws.
- Affiliated to the Labour Council.

- The bargaining process has started, and members do care about their working conditions and compensation.

## Goals

- Full executive.
- Recruit and train five shop stewards.
- Recruit and train JOHS Committee representatives.
- Educate and engage members about the union in general and bargaining specifically.
- Collect member contact information for use by the local for future meetings and member communication.

## Plan

- Director and representative to hold onsite shop steward training
  - Funded by *Needs-Based Training* budget.
- Hold a local-building event onsite:
  - **people involved:** two local activists, RVP, HEU president, representative, regional servicing director, staff organizers, facility maintenance workers.
    - President to address members on bargaining and answer questions.
    - Organizers to draw in members.
    - Maintenance staff to provide support for set up.
  - tent, speakers, music.
  - stations around the tent:
    - need pens, lanyards, pins, and copies of collective agreement and HEU constitution for getting members to provide contact information;
    - learn about local executive positions and sign up, if interested;
    - free donuts, coffee and soft drinks; and
    - enter a draw to win HEU T-shirts, jacket, etc.
- HEU communications department will:
  - develop a poster for the site and for use on social media; and
  - email members one week ahead, the day before, and day of event.
- Funding:
  - for event paid for through *Local Project Fund*.
  - for RVP book off through *Local-Building Plan Fund*.

## LOCAL PROJECT FUND

### Article 2, Section B, Rebates and Local Project Fund

The Provincial Executive will establish each fiscal year an amount not to exceed \$100,000 to fund local projects, campaigns, and local membership building. Locals may make application to the Provincial Executive for access to this fund. The Provincial Executive will monitor the use of the fund and the local shall be accountable for such usage.

The focus of the *Local Project Fund* is to break down the barriers to activism. The Provincial Executive (P.E.) is aware of the many challenges in attracting, encouraging, and keeping union activists both interested and involved.

We need to find different ways to connect with members, to give them hope, and inspire them in ways that are truly meaningful and useful. This includes ensuring they know the union is theirs, that they can make a difference, and that together we are stronger.

All locals can use this fund to help build their local. Locals that are functioning well can seek approval from members for their portion of the expenses at a meeting with quorum.

Locals that are struggling to get quorum or lack an executive will need to seek 100 per cent approval from the P.E.

### Local Project Fund application details

**All local-building projects must receive prior, formal approval from the P.E. before they commence, and must not contravene the *Constitution and By-Laws* or any HEU policies.**

Please refer to the full *Local Project Fund Policy* in *Section 6: Index of Policies*

1. Locals must make an application to the P.E. for funding assistance for local-building projects prior to the project taking place.
2. Locals should submit their application at least two months prior to the project to allow time for approval by the P.E.
3. Locals are responsible for filling out the *Local Project Fund Application Form* and providing details on the purpose of the project, including goals and objectives, specific timelines, and a proposed budget.
4. On completion of a project or campaign, locals must report the results, both successes and shortcomings, including a final financial statement, within two months of completion of the project.

5. When applying for financial assistance, locals must also consider cost-share arrangements to assist with the project.
6. Initiatives should benefit your specific local and, in turn, HEU as a whole. We encourage you to be as creative and imaginative as possible.
7. Applications will be considered based on specific local needs. Projects could include a variety of things such as:
  - improving communication networks at the local level – finding out “how best to keep in touch,” or “what do members want to know?”;
  - finding ways to involve more members in various union activities and to keep them interested and engaged;
  - implementing a mentoring system that will assist in developing the skills of new or young activists;
  - how to connect with the broader community and other organizations; and
  - how your local can get more involved in your own community, such as help organize a Pride event, fundraise for the local food bank, etc.
8. Locals may request assistance from the Provincial Office to help design and implement a particular project, if needed.

**Make it fun, celebrate your successes and help build your local!**



## Local Project Fund Application

**Local name:**

**Date of application:**

**Project Date(s):**

**What is your local trying to achieve?**

**Explain the proposed project to build your local:**

**Will member contact information be collected?**  Yes  No - If no, why not?

Who will be involved from the local?	Positions held, if any, in the local:

**How many members are expected to participate?** \_\_\_\_\_

**Estimated Cost Of Project** (Budget)

<b>Lost wages</b>	
<b>Equipment</b>	
<b>Supplies</b>	
<b>Community outreach/advertising</b>	
<b>Other assistance requested</b> (please be specific)	
<b>Resources requested from the Provincial Office</b>	

**Total cost of project \$** \_\_\_\_\_

**Cost-share amount requested \$** \_\_\_\_\_ **% split** \_\_\_\_\_



## Local Project Fund Report

**Local name:**

**Project:**

**Dates:**

**What was the local project?**

**What did your local achieve?**

**What did your local learn?**

**How many members did you collect contact information from?**

**If contact information was not collected, what was the reason?**

**Did the servicing representative and/or Provincial Executive members participate and how did they support the project?**

**Final cost of project**

<b>Lost wages</b>	<b>Name</b>	<b>Hours</b>
<b>Equipment</b>		
<b>Supplies</b>		
<b>Community outreach/advertising</b>		
<b>Other assistance requested</b> (please be specific)		

**Total cost of project \$**

**Cost-share amount to be paid \$**

**Motion passed at quorate local meeting?**  Yes  No

**Receipts attached?**  Yes  No

\_\_\_\_\_  
**Local Secretary-Treasurer** (print name)

\_\_\_\_\_  
**Local Chairperson** (print name)

\_\_\_\_\_  
**Local Secretary-Treasurer Signature**

\_\_\_\_\_  
**Local Chairperson Signature**

**FOR HEU PROVINCIAL OFFICE USE ONLY**

**Date Received**

\_\_\_\_\_

## **EDUCATION TRAINING**

Education is key to building a successful local. The local executive should help all activists and members access information and communicate with other activists within HEU, other unions, the broader labour movement, and community groups.

HEU holds many educational opportunities which are open to all members. Information about these courses is included in the secretary-treasurer mailings and should be posted on union boards. Information can also be found on the HEU website

Educational opportunities offered by the B.C. Federation of Labour are advertised in federation bulletins and are often included in HEU's secretary-treasurer mailings. They may include conferences and workshops, health and safety, or young workers' retreats, for example.

### **Examples of HEU workshops**

1. Table Officers Training
2. Shop Steward (Level 1 and 2)
3. Chief Shop Steward
4. Occupational Health & Safety (Introductory and Advanced)
5. Know and Enforce Your Rights
6. Demystifying Classifications
7. Supervisors Workshop
8. Workload Workshop
9. Workplace Mental Health
10. Human Rights and the Duty-to-Accommodate
11. Getting Involved
12. Women in Leadership
13. Women Breaking Barriers
14. Introduction to Equity
15. Truth and Reconciliation
16. Domestic Violence at Work
17. HEU Solidarity and Inclusive Leadership Training

Local-specific training and education can be arranged through the HEU education department on topics such as shop steward training, JOHS committee representatives, one-day table officers

training, and how to get members involved with their union. This should be included in the *Local-Building Plan* and submitted to the HEU president.

## **CONFLICT RESOLUTION**

The union has a responsibility to ensure members comply with HEU's policy to protect human rights, prevent bullying and encourage mutual respect when they are acting on behalf of the union, or as the result of participating in union activities or attending union-sponsored functions and events.

As such, HEU also has a responsibility to assist members in dealing with conflict resulting from union activity. This also includes local executives. It is the role of HEU staff representatives to assist locals with conflict, not RVPs.

### **Where to start**

Please refer to the *HEU Officers Guide to Resolving Conflict* for a more comprehensive guide. It can be found on the HEU website [heu.org/sites/default/files/2022-03/HEU-resolving-conflict-guide-digital.pdf](http://heu.org/sites/default/files/2022-03/HEU-resolving-conflict-guide-digital.pdf)

### **Who can help when conflict arises?**

When conflict arises between members, and they are unable to work it out themselves, finding the right person to help is an important first step.

Some conflicts can be managed at the local level, while others will require help. Your HEU staff representative can assist locals and members to work through conflict.

RVPs can also assist in conflict resolution, if it is not regarding interpersonal matters. They can be particularly helpful on constitutional matters, by-laws and other processes within their jurisdiction.

There will be times when your HEU staff representative may not be able to help. These cases may be referred to the HEU president's office.

Some conflict situations should not be dealt with informally. In such cases, members will need to formalize a complaint and access a different dispute resolution mechanism. Individuals or locals may need advice on this.

### **What sort of conflict can be dealt with at the local level?**

On any union-related matter where members are in dispute, every effort should be made to resolve it as quickly as possible. Examples of a dispute might be: two members' argument at a local meeting spills over to the shop floor; executive members can't get along, or feuding stewards.

When embarking on an informal intervention to work through conflict, local officers must be clear with members about the process – confidentiality, initial investigation, bringing the parties together, commitment to the process. In other words, they must set the ground rules.

If local officers feel they cannot help the members, or they find themselves in a conflict of interest, they must advise the members and refer the matter to the HEU staff representative.

### **What is the difference between a formal and informal complaint?**

An informal complaint is where members agree to try and work through a problem at the local level and/or with the assistance of their HEU staff representative.

If the HEU staff representative is unable to help resolve the matter, they may call in additional resources to assist or the issue may be referred to the HEU president's office.

If informal interventions fail, members may, depending on the issue, have access to a range of formal processes. These could include HEU's Policy to Protect Human Rights, Prevent Bullying and Encourage Mutual Respect, the collective agreement and HEU's Constitution and By-Laws.

In some cases, formalizing the complaint at the very beginning will be appropriate.

### **What can a member do if they believe there is a conflict of interest?**

A conflict of interest exists where the responsibilities of office conflict with the private interests of the member. An example might be where the complaint concerns the spouse of a committee member or table officer.

If a conflict of interest exists or where one develops, the committee member or table officer must step aside and refer the matter to their HEU staff representative.

If a conflict of interest exists or develops in relation to the HEU staff representative, the representative will immediately step aside. They will inform their supervisor and the matter may be referred to another HEU staff representative or will be referred to the HEU president's office.

### **What can members do if they are not satisfied with the process or outcome?**

At any point, if a member is unhappy with how a local is managing the process, they can refer the matter to their HEU staff representative. If members are unhappy with how their representative is managing the process, they may refer the matter to the HEU president's office for review and/or contact the representative's supervisor.

If members are not satisfied with an outcome, either the local or the HEU staff representative may refer the matter to the president's office for review.

### **What if members have concerns with HEU staff?**

If members have concerns regarding HEU staff, they must refer to the HEU staff complaints procedure.

## **ONLINE AND HYBRID MEETING TRAINING**

Spurred on by the pandemic, many locals adapted to holding their meetings online. Most locals continue using Zoom – either staying completely online or doing a hybrid of in-person and online meetings.

Organizing virtual meetings takes some upfront work but can increase members' access to their union. All mechanical and constitutional requirements of a local meeting still apply but are conducted differently.

There are many training resources and videos available on the HEU website to support your local holding successful virtual meetings.

### **Resources include:**

- set up Zoom meetings for your local;
- set up hybrid meetings for your local;
- advanced online meeting tools for your local;
- create a Facebook group for your local;
- local online meeting poster template;
- local meeting slideshow template; and
- Zoom tips for meeting participants.

### **Training videos include:**

- getting started with Zoom;
- hybrid meetings;
- starting the meeting;
- running the meeting;
- local meeting template; and
- mock local meeting.

All the resources and training videos can be found at <https://www.heu.org/resources-for-online-meetings>.

## **SHOP FLOOR ENGAGEMENT TOOLS**

To create healthy, working relationships, we must learn to be good listeners. Though it might not sound so difficult, effective listening requires our most sincere efforts.

To be a good listener, we must be willing to be open to other people. We must be patient with their process. And we must have a desire to understand them.

Taken together, this is called “active listening”, and it means:

- creating an opportunity for someone to tell you about themselves, what they are feeling and thinking.
- knowing what they say is about them, not you.
- setting aside your own agenda and paying attention to them.
- not giving advice: remember they have their own answers.

- “reflecting back” what you hear so you can both become clear about their feelings and thoughts.
- noticing if they are talking about their feelings and their needs. If not, ask questions to help them get to that.
- giving them a gift to help them get clear and a gift to yourself to understand them.
- paying attention to non-verbal clues.
- using open and inviting body language: relaxed posture, appropriate personal space and appropriate eye contact.

## **i. Preparing to listen**

There are three pre-conditions when you are listening:

- try not to judge;
- view each other as equals; and
- don't assume.

### **What is an assumption?**

An assumption is something we believe to be true without exploring whether it is or not; a proposition that is taken for granted as if it were known.

We make assumptions about certain beliefs.

For example, older workers may assume younger workers don't know what it means to provide quality care; they assume they don't do a thorough job; they don't care about the residents and they only care about getting the job done.

If we explore this statement, we get a better understanding of what that could mean. Someone may make this statement based on their own assumptions. If we are a younger worker, we may make assumptions about older workers who make these types of statements.

Recently educated, younger health care workers may see older workers as living in the past and slowing them down.

We have been taught to relate emotionally, rather than to explore intellectually. Assumptions are like stereotypes.

### **What makes it hard for us to listen?**

a) **We'd rather talk than listen because:**

- it addresses our need.
- we are in control.
- it boosts our sense of identity.
- there's more opportunity to achieve our goals.

**b) We're distracted:**

- because we talk at 200-250 wpm (words per minute) but can listen at 300-500 wpm.
- which means when the other person is talking, we get side-tracked by our own thoughts.
- when we come back to the room, we find we've lost track of the conversation.
- rather than lose face, we nod, smile and hope nobody will notice.
- when we want to respond to the speaker, we stop listening to avoid forgetting what we are going to say; we also stay in our head to think about better ways to make our case.

**c) We're not interested:**

- speakers are responsible for their listeners as much as listeners are responsible for listening.
- as a speaker, we need to engage the listener by:
  - keeping the language interesting;
  - varying our tone;
  - using supporting body language;
  - paying attention to the listener;
  - talking about things the listener might be interested in;
  - not talking too long; and
  - giving the listener the opportunity to reply.

**d) We're busy talking:**

- we're self-focused and don't notice others waiting to speak.
- even if we do notice others, we want to control the conversation and finish what we need to say.

**e) Other barriers to listening:**

- power and authority – both perceived and real;
- fearing different opinions;
- fear of trying different ways of communicating;
- using language everyone doesn't understand; and
- rushing into problem-solving rather than exploring issues.

**ii. Listening to understand and create empathy****What is empathy?**

The concept of empathy is about being able to understand another person's experience. This includes their perceptions, feelings and meanings. When two people communicate, they each speak from their own subjective experience.

Individual subjective experiences are often confusing or difficult to understand for other people. This is even more difficult when there are big differences between people who are interacting. Empathy can also be difficult because we often do not agree with what the other person is saying.

We may think if we try to understand what they are saying, it will be seen as wanting to agree with them. However, understanding is not the same as agreeing.

Empathy is “an ongoing, corrective process...that allows two individuals to move toward varying degrees of understanding” (Broome, 1993, p. 100). As people build empathy with each other, they continually check what is understood and how well it is understood.

At the very least, empathy is the willingness to accept and respect another person’s right to their point of view and feelings, regardless of whether we agree.

### **Skills for listening empathically**

To make true listening possible, you first need to deflect your own impulses to argue, defend or shut out perceptions that do not match your own. Listening to gain a better understanding of what the other person means and feels is the goal. Empathy is not achieved simply through skill, although listening skills generally support the effort to build empathy.

The verbal skill called empathy is a combination of paraphrasing and acknowledging feelings. After listening to the speaker, the listener lets the speaker know what they thought the speaker was trying to say. Empathy in this sense is a means of checking the speaker’s intentions with the listener’s interpretations.

### **Empathic listening helps:**

- show willingness and openness toward another person’s experience;
- provide opportunities to change negative perceptions of the other person;
- clarify individual meanings;
- provide opportunities for reflection and awareness;
- create an atmosphere of willingness to listen to you in return;
- defuse escalating tension, anger, resentment, etc.; and
- reduce defensiveness and repetitive cycles of argument and debate.

### **iii. Non-verbal behaviours for better communications**

There are a number of non-verbal behaviours you can use to be more effective in your work to be an active listener. These behaviours include:

- maintaining a relaxed yet alert posture;
- being actively involved in the conversation;
- acknowledging non-verbally with head nods, smiles;
- maintaining effective eye contact (not staring, not looking away often, and not rolling eyes);
- minimizing distracting gestures (tapping a pencil, fidgeting, moving around a lot, looking at watch);
- facing the person squarely;
- keeping an open posture (not rigid, folded arms); and
- leaning slightly forward.

## ACTIVE LISTENING SKILLS

### Reflecting Feelings

#### Purpose

- Indicates you understand the person's feelings.
- Lets the other person hear their feelings "reflected back", so they can evaluate their feelings.
- Helps defuse the situation.

#### How To

- Listen to tone of voice and watch body language.
- Tell the other person what you understand their feelings to be. i.e. "You look upset right now."

### Paraphrasing

#### Purpose

- Indicates you are listening to and understanding the other person.
- Lets you check your understanding and interpretation.
- Foundation for many other "facilitative" listening skills, including mirroring, gathering and drawing people out.

#### How To

- Say back to the other person what you understand them to be saying and meaning in your own words. i.e. "You are thinking that I don't listen to you."
- "It sounds like what you're saying is..."

### Questioning

#### Purpose

- Gathers information to expand your understanding of the issues in question.
- Helps focus the discussion.

#### How To

- Use open-ended questions: what, how, when, where, who?
- Avoid "why". i.e. "What is it about this procedure that

### Descriptive Language

#### Purpose

- Use to talk about an issue or talk about your interest(s).

#### How To

- Use neutral language and describe what you see, hear, etc. i.e. "I noticed when I suggested a different procedure, you became quiet."

## “I” Statements

### Purpose

- Describes your reactions.

### How To

- Talk about your feelings and concerns. i.e. “I liked it when you ....”

## Maintaining Silence

### Purpose

- Gives the other person time to think through their reply to a challenging answer.

### How To

- Encourage the person to take their time.
- Maintain eye contact and demonstrate an interest.

## Summarizing

### Purpose

- Ensure you have heard correctly and understood the other person’s perspective.

### How To

- Restate the key aspects of the discussion.
- Conclude the discussion and focus on planning for the future. i.e. “The three major issues you raised were...” “To summarize then....”

*Source: Adapted from Michael Keller, “Effective Communication”; S. Kaner, “Facilitator’s Guide to Participatory Decision-Making” and other resources*

## LOCAL BUILDING RESOURCES

As a member of a local executive, you can access resources from the union to improve and expand your local’s capacity for supporting members.

These resources to assist your local include help with:

- Local budgeting;
- Accessing the small and medium-sized local supplement; and
- Drafting bylaws.

These resources are outlined in more detail in the Chairperson and Secretary-Treasurer’s manuals available online.

## Local budgeting

When a local passes an annual budget with the approval of the membership, it allows the executive to make use of existing local resources without having to go to the members each time an expenditure that is outlined in the budget is made.

See the Worksheet – Annual Local Budget to build a budget.

## Local supplement

The small and mid-sized local supplement (SMLS) is intended to assist small and mid-sized locals with ongoing costs which exceed the funds available to them through their monthly dues rebate.

Eligible locals who meet the requirements for the SMLS will receive the \$1,500 annual payment. This is in addition to the local dues rebate.

The annual deadline for a local to make a SMLS application is June 30 in each calendar year.

To learn more about accessing SMLS see Tab 5 – Building Strong Locals in the Chairperson’s Manual.

## Drafting by-laws

By-laws are a list of standing motions at a local that allows them to operate within the Constitution, but still reflect the unique circumstances of the local.

These local by-laws primarily define how the local operates based on their individual circumstances, as decided by the members. It’s not just about spending motions.

By-laws often develop over a period of time. But they can also be introduced at a meeting as a single document and debated, amended if necessary, and passed.

But once completed, a local’s by-laws must be sent to the Provincial Office and approved by the Provincial Executive to ensure they do not violate the Constitution or spending guidelines.

To learn more about drafting by-laws see Tab 6 – *Local By-Laws in the Chairperson’s Manual*.



## Local Annual Budget and Quarterly Tracking Template

It is strongly recommended Locals prepare an annual budget for approval by the membership at a meeting with quorum.

**Local Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

	Current Year Budget	Q1 Actual	Q2 Actual	Q3 Actual	Q4 Actual	Total
<b>Revenue - Rebates</b>	\$	\$	\$	\$	\$	\$
<b>Less: Expenses</b>						
Bank Charges						
Cell Phone/Internet						
Donations						
HEU Convention Expenses						
Honorariums						
Local Building						
Local Bursaries						
Local Events						
Local Meeting Expenses						
Member Education						
Office Supplies						
Per Capita Exp. (Lab. Coun.)						
Retirement Gifts/Goodwill						
Other Expenses						
<b>Total Expenses</b>	\$	\$	\$	\$	\$	\$
*Expenses MUST match that of the Quarterly Report.						
<b>Net Balance</b>	\$	\$	\$	\$	\$	\$



## Small And Mid-Sized Local Supplement Application

The Small and Mid-sized Local Supplement (SMLS) is intended to assist small and mid-sized locals with on-going costs which exceed the funds available to them through their monthly dues rebates.

The SMLS is being provided in recognition that small- and mid-sized locals do not benefit from economies of scale available to larger locals in their purchase of goods and services.

Eligible locals who meet the requirements for the SMLS will receive the **\$1,500 annual payment**. This is in addition to the local dues rebates.

The SMLS was established by delegates to the 2022 convention of the Hospital Employees' Union.

**The deadline for the 2023 SMLS application is June 30, 2023 @ 5 p.m.**

Local eligibility:

- 500 members or less (dues paying members as calculated by Provincial Office based on payroll records).
- Submitted their first quarterly report for 2023 to the Financial Secretary.
- Include with application a copy of most current bank statement.
- Identify that the support is required.

**Please note that the locals must apply annually for the SMLS. This supplement is not cumulative - locals cannot apply retroactively for the SMLS for previous years.**

### Provide the following information

Local Name	Local contact email
Local contact address	
Have you filed your first quarter financial report (from March 2024)?	<input type="radio"/> Yes <input type="radio"/> No
Have you included your local's most current bank statement with this application?	<input type="radio"/> Yes <input type="radio"/> No
Does your local require the small mid-size supplement to assist with ongoing costs?	<input type="radio"/> Yes <input type="radio"/> No

Local Chairperson	Local Secretary-Treasurer
Name	Name
Signature	Signature
Date	Date

**Please note that both the chairperson and secretary-treasurer must sign this application**

### Mail Form and documents to:

Hospital Employees' Union  
Attention: Local Supplement  
5000 North Fraser Way  
Burnaby, BC V3J 5M3

**OR**

Email to: [localsupplement@heu.org](mailto:localsupplement@heu.org)

**DEADLINE JULY 31, 2024**

**Please answer all questions  
and remember to include a copy  
of your local's bank statement.**

## **SMALL- AND MID-SIZED LOCAL SUPPLEMENT (SMLS)**

At HEU's 2022 convention, delegates adopted a resolution establishing a *Small- and Mid-sized Local Supplement* (SMLS) which provides additional budgetary support to smaller locals over and above their monthly dues rebate.

Beginning in 2023, the \$1,500 supplement became available annually to qualified locals.

The criteria are as follows:

- 500 or fewer members (as calculated by the Provincial Office based on payroll records);
- submitted their first quarterly report for the year;
- confirm they require additional support; and
- provide a copy of their most-current bank statement.

### **Application details**

Qualified locals must apply annually for the SMLS by June 30. For example, applications for the 2024 supplement must be submitted by June 30, 2024.

Please note that locals will not be able to claim the SMLS for previous years. For example, in 2024, a local will not be able to apply for a 2023 supplement.



**What was discussed at the meeting?**



# Index of Policies

## LOCAL PROJECT FUND POLICY

- Locals can apply to the Provincial Executive for funding assistance for local projects and/or campaigns.
- Locals are responsible for filling out the *Local Project Fund Application Form* and providing details on the purpose of the project, including goals and objectives (what are you trying to achieve?), specific timelines (start and end dates) and a proposed budget.
- Locals are accountable to the Provincial Executive. Within two months of completing a project or campaign, locals must report the results, both successes and shortcomings, including a final financial statement. It is expected that most projects would occur within a single fiscal year.
- Efforts will be made to accommodate as many locals as possible. More than one application per local may be considered, in special circumstances, but priority will be given to locals that have not previously received assistance within the current year.
- When applying for financial assistance, locals must also consider cost-share arrangements to assist with the campaign/project.
- Applications will be considered based on specific local needs. Projects could include a variety of things, such as:
  - improving communication networks at the local level – finding out “how best to keep in touch”, or “what do members want to know?”;
  - finding ways to involve more members in various union activities and to keep them interested and engaged;
  - implementing a mentoring system that will assist in developing skills of new or young activists;
  - how to connect with the broader community and other organizations; and

- how your local can get more involved in your own community – maybe sponsor a sports team, help organize a Pride event, Red Dress event, collect food items for the local food bank, or plant an HEU community garden plot.
- Initiatives should benefit your local and HEU. We encourage you to be as creative and imaginative as possible.
  - Locals may request assistance from the Provincial Office in helping to design and implement a particular project, if needed.
  - All local projects must receive formal approval from the P.E. prior to commencing and must not contravene *HEU's Constitution and By-Laws* or policies.

**Please Note:**

- Expenditures on an event that has already occurred prior to approval will not be reimbursed.
- The local portion of the cost-share must be approved by the membership at a meeting with quorum.
- Submit the application as early as possible (ideally two months in advance, but at least four weeks prior to the proposed project) as requests for more than \$2,000 must be approved by the Provincial Executive at a regularly scheduled meeting.

Make it fun, celebrate your successes, and help build your local!



Please submit completed forms to [Financial.Secretary@heu.org](mailto:Financial.Secretary@heu.org) at least 2 months prior to the commencement of the local project

Local Name: HEU Local Date of Application: October, 2023

Project Date(s): February 2024

**What is your Local trying to achieve?**

Have an opportunity for members to meet the local executive and stewards, ensure that members know how to contact local activists for assistance and how to enforce their collective agreement rights. Members can learn about our history as a union, how bargaining for their working conditions works, and how they can get more involved. We will also be mapping out the local and collecting contact information from members to keep them informed of future meetings. And we want to ensure that we are able to get quorum at a meeting where we need to update the local by-laws and pass the 2024 budget. We will also be receiving and debating bargaining demands and resolutions in early preparation for the conventions in the fall.

**Explain the proposed project to build your Local:**

2 activists will be booked off for 2 days to walk around the facilities, mapping the local, introducing themselves to members, handing out lanyards, collective agreements, and business cards, and encouraging members to attend the "Mega Meeting". The event will include stations where members can move about to learn about HEU history, bargaining, stewarding, JOHS and educational opportunities. There will be a station set up to discuss the by-laws, and one for bargaining demands, and another for convention resolutions and these will be attended to by local activists. Members can enjoy lunch on us while they learn and engage. At 4pm, we will hold the local meeting and pass the by-laws and budget.

**Will member contact information be collected?**  YES  NO - If no, why not?

During the walk about and the Mega Meeting, we will encourage members to provide their personal emails and we will put their name in a draw for an HEU jacket and gift certificate to a local business.

**Who will be involved in from the local?**

Donalda

Donald

Danika

Denise

**Positions held, if any, in the Local:**

Chairperson

Secretary

Lead Steward

OHS Rep

**How many members are expected to participate?** 200

**ESTIMATED COST OF PROJECT (BUDGET)**

<b>Lost Wages</b>	2 activists X 2 days \$1,500 3 activists for Mega Meeting \$1,200
<b>Equipment</b>	BBQ rental: Free Microphone and speaker rental \$100
<b>Supplies</b>	Food: hot dogs \$500, carbonated drinks \$100, cake \$100, cookies \$200, Decorations \$200, other \$200
<b>Community Outreach/Advertising</b>	
<b>Other Assistance requested (please be specific)</b>	Inviting the President and Financial Secretary to attend. Require the Rep to answer collective agreement questions
<b>Resources requested from the Provincial Office</b>	HEU Merchandise (HEU jacket, water bottles, lanyards), collective agreements, event posters, business cards

Total Cost of Project \$ \$4,000 Cost Share Amount Requested \$ \$2,000 % split 50

**Motion Passed at Quorate Local Meeting**

The local will spend up to \$2,000 to organize the 2024 Mega Meeting pending the approval of the Local Project application by the Provincial Executive

Date of Quorate Local Meeting: October 2023

Donald  
Local Secretary-Treasurer - Print Name

Donalda  
Local Chairperson - Print Name

\_\_\_\_\_  
Local Secretary-Treasurer Signature

\_\_\_\_\_  
Local Chairperson Signature

**FOR HEU PROVINCIAL OFFICE USE ONLY**

DATE RECEIVED: \_\_\_\_\_ ACCEPTED or DECLINED: \_\_\_\_\_

AMOUNT APPROVED: \_\_\_\_\_

REASON FOR DENIAL: \_\_\_\_\_

DATE: \_\_\_\_\_

## **PROVINCIAL EXECUTIVE POLICY**

### **PROVINCIAL EXECUTIVE ATTENDANCE AT LOCAL MEETINGS**

#### **Local invitations for PE members to attend local meetings**

If a local executive wishes to invite a PE member other than their Regional Vice Presidents to attend their local meeting they will contact the President or Financial Secretary.

#### **Annual local election meetings**

Provincial Executive members may attend local membership meetings to prepare for local elections, local nomination meetings and when local elections are held to assist locals with electing their local executives.

Invitations from local executives are not required for PE to attend these meetings and PE will have voice at the meeting.

PE expenses for these meetings will be the responsibility of the provincial office.

PE members will notify the local chair or secretary treasurer and the appropriate servicing representative in advance that they will be attending the local election meeting.

PE members attending local election meetings will submit a written report on the meeting including the election results, key issues raised by the membership at the meeting and any follow up required.

#### **Provincial issues, campaigns or initiatives**

From time to time the Provincial Executive will decide it is important for PE members to attend local meetings to report on particular issues, such as bargaining or other significant events in the union or to report on and/or mobilize members around campaigns or initiatives.

Invitations from local executives are not required for PE to meetings on these occasions and PE will be given time on the agenda for their report.

PE expenses for these meetings will be the responsibility of the provincial office.

PE members will notify the local chair or secretary treasurer and the appropriate servicing representative in advance whenever they will be attending a local meeting for these purposes.

PE members attending these local meetings will submit a written report on the meeting including the membership response to the campaign or initiative, key issues raised by the membership at the meeting and any follow up required.

#### **Local Building**

As part of an agreed upon local building plan, an RVP doing local building with a local executive is entitled to attend that local's meetings and will have voice at the meetings.

Invitations from local executives are not required for PE to meetings on these occasions and PE will have voice at the meeting.

The RVP will notify the local chair or secretary treasurer and the appropriate servicing representative in advance whenever they will be attending a local meeting for these purposes.

PE expenses for these meetings will be the responsibility of the provincial office.

The RVPs will submit regular written reports on local building with local executives.

## General

As per the *HEU Constitution and Bylaws*, the Secretary Business Manager, President and Financial Secretary may attend any local meetings or events to carry out the business of the union.

Provincial Executive members will defer to servicing representatives on any questions relating to servicing or collective agreement issues and will forward servicing issues to the appropriate servicing representative or director.

Servicing representatives will defer to the Provincial Executive member on constitutional issues.

In preparation for attending local meetings, PE members will consult with the appropriate servicing representative about current local issues.

The President may assign provincially elected Vice-Presidents to attend local meetings and the Financial Secretary may assign Trustees to attend local meetings.

Provincially elected Vice-Presidents will consult with the President and Trustees will consult with the Financial Secretary about their attendance at local meetings.

Provincial Executive members will advise the administrative committee (by emailing the Coordinator of Policy and Planning) whenever they are booked off to attend local meetings.

PE members will submit written reports whenever they attend a local meeting.

Locals will be advised of this policy.

(PE June 2013)

For 2022, we will trial:

RVPs invited to attend a local membership and/or executive meetings will be credited up to 1 hour per local, per month total. This does not qualify for book off or travel expenses. Local Reports must be submitted to be included. Time can be accumulated to be submitted for a future Rest Day which must be pre-approved.

## **POLICY TO PROTECT HUMAN RIGHTS, PREVENT BULLYING AND ENCOURAGE MUTUAL RESPECT**

Mutual respect must be the basis of interaction among members and staff of the Hospital Employees' Union at all times, but particularly at HEU Conventions, HEU Conferences and other HEU sponsored events and in day to day interaction between members and staff. The Hospital Employees' Union will not tolerate, condone or ignore behaviour that is likely to undermine the dignity or human rights of an individual either during working sessions or during social activities.

In order to ensure an environment that is supportive of mutual respect and fair treatment, the Provincial Executive has established the following policy and procedure. It defines what is unacceptable behaviour and sets out a complaint procedure to effectively deal with violations of the policy.

Protecting the human rights, prevent bullying and encouraging mutual respect of members and staff is fundamental in ensuring a strong and united Union. This policy enshrines the anti-bullying and harassment protections of the Workers Compensation Act and OH&S policies and the anti-discrimination protections of the BC Human Rights Code.

Under the Workers Compensation Act, bullying and harassment includes any inappropriate conduct or comment by a person towards a worker (includes a member at an HEU event) that the person knew or reasonably ought to have known would cause that person to be humiliated or intimidated.

Under the BC Human Rights Code discrimination is prohibited on the following grounds: Indigenous identity, race, ancestry, colour, place of origin, political belief, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, physical or mental disability, and conviction for which a pardon has been granted.

Harassment based on the grounds includes:

- verbal abuse or threat;
- unwelcome remarks, jokes, innuendos or taunting about a person's body, attire, age, marital status, ethnic or national origin, religion, sex, gender etc;
- displaying of pornographic, racist or other offensive or derogatory pictures or materials;
- practical jokes which cause awkwardness or embarrassment;
- unwelcome invitations or other requests, whether indirect or explicit, or intimidation;
- leering or other gestures;
- condescension or paternalism which undermines self-respect;
- unnecessary physical contact such as touching, patting, pinching, punching;
- physical assault
- repeated behaviour which a person has objected to, and therefore is known to offend.

### **Note:**

This policy applies to HEU members and HEU staff during HEU Conventions, HEU conferences, and other HEU-sponsored events.

This policy applies to day to day interactions between HEU members and HEU staff.

This policy does not apply to HEU members in the workplace (please refer to your Collective Agreement for provisions that apply to HEU members).

This policy is supplementary to and does not supersede the parties' obligations under the HEU/PEA-HESU Chapter Collective Agreement or under the HEU Constitution and By-Laws.

## **Scope**

The underlying goal of this policy is to protect human rights, eliminate bullying and encourage mutual respect at all times. The underlying approach is a problem solving one to resolve disputes in a mutually satisfactory manner.

## **Procedures**

Any HEU member or HEU staff member at a Union-sponsored event who believes that they have been subjected to behaviour that is discriminatory or bullying and harassing contrary to this policy may access this procedure.

Confidentiality is a vital part of this process. It is a requirement of this policy that all parties respect the confidentiality of the process.

A complainant, respondent or a witness who is part of this process is exercising their legitimate rights. It is a serious violation of this policy if there is any retaliation against a complainant, respondent, or a witness for having initiated or participated in a complaint.

### **First Step: Direct Discussion**

Where the complainant feels safe they can discuss their concern directly with the person (the respondent) in an effort to resolve the concern.

### **Second Step: Informal Complaint**

If the complainant does not believe that the matter has been satisfactorily resolved through direct discussion or the First Step did not occur, they may contact the Ombudsperson to make an informal complaint. The Ombudsperson shall advise the complainant of the merits of the complaint and possible courses of action. All discussions are without prejudice and will be treated with complete confidentiality.

### **Third Step: Mediation**

If the complainant and the Ombudsperson believe that the matter can be satisfactorily resolved through mediation the Ombudsperson shall contact the respondent regarding the possibility of mediating the matter. All discussions in mediation are without prejudice and will be treated with complete confidentiality.

## **Fourth Step: Formal Complaint**

If the matter does not proceed to mediation or is not resolved at mediation the complainant may file a formal complaint to the Complaints Investigator in writing outlining the details of the alleged violation of HEU's policy to protect human rights, prevent bullying and encourage mutual respect. This complaint should be filed within six (6) months of the most recent incident(s) giving rise to the complaint. Upon receipt of the formal complaint, the Complaints Investigator shall notify the respondent in writing within fourteen (14) days.

The Complaints Investigator shall meet with the complainant and respondent as expeditiously as possible to hear and investigate the complaint. The Complaints Investigator may make an effort to achieve a resolution of the complaint at any time. Both parties are entitled to be accompanied by representatives and are entitled to call witnesses.

Within sixty (60) days of the conclusion of the investigation the Complainants Investigator shall report on the results of the investigation, including any recommendations for action. The recommendation(s) will not include discipline.

The Complaints Investigator shall forward a copy of the report to the complainant, the respondent and the Administrative Committee. If appropriate, the Administrative Committee will forward the report to the Provincial Executive.

The Provincial Executive will take such action that it considers necessary to uphold the HEU policy designed to protect human rights and encourage mutual respect.

### **Please Note:**

Allegations of violations of this policy are treated very seriously. There is a requirement for Provincial Executive members and staff to report allegations of a violation of this policy to the Co-ordinator of Human Resources or their designate.

The Provincial Executive has, by motion, made it clear that HEU considers serious violations of this policy are covered by Article 19 (Emergency Suspension and Expenses) of the HEU Constitution and By-Laws.

*(Revised May 26, 2023)*



# Contact Us

## Provincial Office

5000 North Fraser Way  
Burnaby, B.C. V5J 5M3  
1-800-663-5813 (toll-free)  
fax: 604-739-1510





## Okanagan Office

100-160 Dougall Rd. South  
Kelowna, B.C. V1X 3J4  
1-800-219-9699 (toll-free)  
fax: 1-250-765-0181

## Kootenay Office

745 Baker Street  
Nelson, B.C. V1L 4J5  
1-800-437-9877 (toll-free)  
fax: 1-250-352-6999

## Online Platforms

-  [heu.org](http://heu.org)
-  Hospital Employees' Union
-  @HospEmpUnion
-  heu\_in\_bc

## Northern Office

1197 Third Avenue  
Prince George, B.C. V2L 3E4  
1-800-663-6539 (toll-free)  
fax: 1-250-562-3645


## Vancouver Island Office

201-780 Tolmie Avenue  
Victoria, B.C. V8X 3W4  
1-800-742-8001 (toll-free)  
fax: 1-250-480-0544

## Vancouver Island - Comox Office

6-204 North Island Highway  
Courtenay, B.C. V9M 1C7  
1-800-624-9940 (toll-free)  
fax: 1-250-331-0673

## Email

-  [heu@heu.org](mailto:heu@heu.org)