

## LOCAL OFFICERS TRAINING: PARTICIPANT HANDOUTS

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## HANDOUT 1

### PSAC Statement on Harassment

Our union is made strong by working together to improve our working lives and to preserve the rights that we have struggled to achieve. Mutual respect is the cornerstone of this cooperation. The PSAC Constitution states that every member is entitled to be free from discrimination and harassment, both in the union and at the workplace, on the basis of age, sex, colour, national or ethnic origin, race, religion, marital status, criminal record, disability, sexual orientation, gender identity or expression, language, class or political belief. Members are also entitled to be free from personal harassment.

If you experience harassment at this event, contact the identified Anti-Harassment Resource Person(s) to discuss the situation and possible responses. Our initial approach is to encourage early and informal resolution and to facilitate our members speaking directly with one another to resolve the matter. If this is not successful or possible, the Constitutional and policy mandates on the issue of harassment will be fully and quickly enforced.

Harassment in all its forms detracts from our common purpose and weakens our union. Let each one of us, as we work together on the important task at hand; treat each other with dignity and respect.

HANDOUT 2  
Local Officer Priorities and Commitments

**Fundamental Commitments**

1. Why am I here? I joined my local executive because:
  
  
  
  
  
  
  
  
  
  
2. Commitments outside my union work that are important to me are:
  
  
  
  
  
  
  
  
  
  
3. Number of hours per week I can commit to executive work:

**Skills and qualities within the executive**

4. Skills and qualities that I bring to the executive:
  
  
  
  
  
  
  
  
  
  
5. Skills and qualities that I hope to develop or improve while on the executive:
  
  
  
  
  
  
  
  
  
  
6. How can I share my skills with other executive members?

7. How can I develop or refine the skills I need to execute my responsibilities?

**Decision-making**

8.

a. Discussions I'd like to have in my executive about decision-making

b. Skills I'd like to develop related to decision-making

**Member engagement**

9. Something to remember about member engagement in my local:

**Taking care**

10. If I feel overwhelmed by union work and/or at risk of burning out, I will:

Signature: \_\_\_\_\_

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

**HANDOUT 3**  
**Union Structures**

For the scenarios below, discuss and identify which union structures within the PSAC (Local/Branch, Component, PSAC Regional or PSAC National) could assist with the scenarios presented. There may be several options for some of the scenarios.

Example:

	<b>Local/Branch</b>	<b>Component</b>	<b>Regional Office</b>	<b>National Office</b>
How can you find out more about union education?	Local bulletin board; Local newsletter		Regional rep or Regional education officer; <a href="https://ontario.psic.com/">https://ontario.psic.com/</a>	<a href="https://psacunion.ca/education">https://psacunion.ca/education</a>

	<b>Local/Branch</b>	<b>Component</b>	<b>Regional Office</b>	<b>National Office</b>
How do you get a PSAC membership card?				
What do you have to do if you want to go to PSAC National Convention?				
How do you get a copy of your collective agreement (CA)?				
What can you do to get your sister-in-law's workplace unionized?				

What can you do if you think your position is incorrectly classified?				
What can you do if you want to see some specific improvements to the collective agreement?				
How can you find out where your union dues go?				
How can your local send a delegate to the National Women's Conference?				

HANDOUT 4  
Local Responsibilities

<b>Responsibility</b>	<b>Who Leads This Work</b>
Recruits and trains Stewards	
Chairs local meetings	
Records and distributes minutes	
Attends labour-management consultation meetings	
Handles grievances	
Signs up Rands	
Collects and deposits Local funds	
Prepares and presents financial reports	
Maintains a current list of Local members' contact info	
Handles staffing related recourses	
Interprets Local by-laws	
Chairs Local committees	
Recruits members to take union courses	
Negotiates return to work protocol for workers with disabilities	
Ensures the workplace and Local is barrier-free for members from equity-seeking groups	
Reports on Joint Occupational Safety & Health (JOSH) decisions to the Local	
Requests input from the Local to the JOSH	
Attends JOSH meetings	
Opens, distributes and files the mail	

Maintains the Local files	
Publishes a Local newsletter	
Coordinates membership participation on picket lines, rallies, campaigns, etc.	
Ensures compliance with Local expenditure guidelines	
Organizes workplace union training	
Posts union notices, posters, etc. On the bulletin board	
Attends Component / Regional conferences and activities on behalf of the Local	
Submits Local resolutions to convention	
Attends conventions on behalf of the Local	
Negotiates with local management	
Organizes Local strike structure	
Conducts workshops for Local members	
Is anti-harassment Coordinator for the Local	
Monitors and enforces Employment Equity Plan	
Liaises with other unions and community groups	
Coordinates participation in PSAC Regional Committees	
Pays Local bills	
Coordinates submission of Local bargaining demands	
Attends District Labour Council and Area Council meetings on behalf of the Local	
Ensures that the employer respects the collective agreement	

Interprets the Local's computer printout	
Researches grievances	
Facilitates new-member orientation sessions	
Prepares and posts Local meeting notice	
Ensures that measures such as childcare are put in place to facilitate the participation of members with family obligations	

## HANDOUT 5

### Consensus Decision-Making: The Formula

**1. Introduce the issue or proposal:**

- state what is to be decided
- provide any necessary definitions
- provide background information

**2. Discussion:**

- Answer questions and provide necessary information everyone contributes, even if it is just to agree with a point, ask for clarification, or indicate ambivalence'

**3. Summarize and Clarify:**

- Facilitator keeps discussion on track
- periodically summarizes and clarifies

**4. Test:**

- is beginning to repeat itself, Facilitator states the conclusion that seems to have been reached and asks if anyone objects
- do a round; silence can only be taken to mean agreement if that is stated as a ground rule
- the decision must be one that all group members are able to live with; if serious objections exist, the decision is not made

**5. Confirm:**

- restate the decision

## HANDOUT 6

### Consensus Decision-Making: AEC Orientation Workbook

#### **Definition of Consensus**

Consensus has been achieved when everyone in the meeting can honestly say the following four statements to every other person:

- I believe you understand my point of view.
- I believe I understand your point of view.
- I believe the decision has been made in an open and fair manner.
- I am willing to support the group's decision, whether or not it is my preference.

#### **Steps in Reaching Consensus**

Rounds will be done for each key decision.

1. In the event a decision cannot be reached by consensus, the AEC will decide to: continue the discussion in the current meeting and push back other items.
2. table the item for further discussion in future meetings and identify any further information people will need to facilitate that discussion.
3. refer the item to committee or staff for further discussion and formulation of recommendations, or other arena for resolution; or
4. declare that there is no consensus and decide to
  - continue with a modified goal or objective
  - Disband
  - seek assistance to reach a resolution.

#### **Levels of consensus**

During a round, each person indicates where they are with respect to the decision being proposed:

1. Fully support
2. Support with reservations
3. Acceptable
4. Will not block it, can live with it
5. Need more information or more discussion. (Identify what information is needed, how it will be obtained, and when)
6. No, cannot accept it

Any response at # 4 or above constitutes consensus. # 5 indicates that with more information or discussion, consensus may be possible. # 6 indicates a fundamental disagreement.<sup>1</sup>

*Excerpt from The Alliance Executive Committee (AEC) Orientation Workbook*

## HANDOUT 7 Organizing Versus Apathy

### **Secret #1: Organizing**

#### **Lesson 1: Attitude Adjustment**

You're reading this. That means you're interested in organizing where you work. You want to fix problems you see around you. Maybe something unfair has happened to you, or to someone you work with, and you want to do something about it.

For us, that's **organizing**.

Organizing is a lot like cooking: there are time-tested recipes that anyone can learn, methods that work, and some that don't. Your results may not be perfect every time - since we're dealing with human beings here - but you will do better if you learn from the successes and mistakes of the organizers who've gone before you.

#### **Organizing Is an Attitude**

Organizing is first of all an attitude. It's the attitude that you and your co-workers together can do something to make things better. It's the attitude that action is better than complaining. It's the attitude that problems are just waiting for a solution, and that strength in numbers is part of that solution.

It's the refusal to be discouraged - at least not for long. It's the willingness to listen to others with respect, so that the plan you come up with reflects the good ideas of many people.

If you have the organizing attitude, you feel it is necessary to respond to unfairness. You are committed to building power with your coworkers, not just talking about it. You believe in collective action and want to get better at putting others in motion.

### **Secret #2 Apathy**

#### **Apathy Isn't Real**

The first attitude adjustment an organizer needs is to get over the idea that co-workers don't care-- that your workplace is bogged down in "apathy."

It might feel like your co-workers don't care. But it's more likely that people are scared to say anything or feel powerless. They might say everything is fine because they don't believe it can change, or they can't imagine it being different, or they assume the problem they care about isn't a "union issue." Organizing is the antidote.

*Excerpts from: Secrets #1 and #2, Chapter 1, Alexandra Bradbury, Mark Brenner, and Jane Slaughter, Secrets of a Successful Organizer, Labor Notes, 2018.*

## HANDOUT 8

### What's the Real Problem?

Your workplace may feel like it's bogged down in "apathy," but under the surface, there's always something else going on. Here are some ways to understand what looks like apathy and respond to it.

#### ***"NO ONE SEEMS TO CARE."***

**What's going on:** Everyone cares about something—but the something might not be what you expect.

- The issue you're focused on might not be a priority for your co-worker.
- She might feel strongly about other issues that haven't caught your attention.
- She might assume her problem isn't your issue or isn't a union issue.

**What to do:** Listen.

- Pick a few co-workers you'd like to know better. Make a point of talking with them to
- find out what's on their minds.
- Show respect and understanding for the issues your co-workers care about, and they'll
- be more likely to do the same for you.

#### ***"IT'S HARD TO SEE HOW THINGS COULD CHANGE."***

**What's going on:** Your co-workers don't believe that they have power—yet.

- Most people have always felt powerless and disorganized at work. They've never felt strength in numbers.
- Problems seem too big to tackle.
- The boss has cemented the idea that his decisions are final.

**What to do:** **Inspire** your co-workers. Show them that change is possible if you work together.

- Bring people together. Group support can help build hope.
- Start small. Look for fights you can win with the people you have on board so far. When a tiny campaign gets results, more people will be drawn in, and their confidence will grow.
- Develop a credible plan to win. Ask, "What solution are we proposing?" "Who in management has the authority to say yes?" "What could we do together to get that
- person to say yes?"
- Share stories of tactics that have worked elsewhere.

**“NO ONE’S WILLING TO DO ANYTHING.”**

**What’s going on:** Many people won’t initiate activity, but they might respond if asked directly by someone they trust.

**What to do:** Figure out small, specific requests. Approach co-workers personally.

- Respect the time constraints in your co-workers’ lives.
- Show lots of appreciation for anything they’re willing to do.
- Make it clear that any victories were won by the whole team.

**“NO ONE COMES TO MEETINGS.”**

**What’s going on:** People won’t be motivated to come unless they feel their participation matters.

- If a meeting is just to “get information,” it’s easy to skip it.
- An email or a notice on the bulletin board usually won’t inspire people to attend.

**What to do:** Give your co-workers meaningful roles. Let them know how their presence or absence will affect issues they care about.

- Make the meeting pleasant and productive. Prepare a clear agenda, a time limit, and a reason to attend, such as a hot issue.
- Face-to-face invitations are best. Divide up your workplace and find several other people to share the work of inviting people individually.
- Consider the practical things that can make meetings more accessible: scheduling, location, childcare, translation, transportation.
- Be flexible. Sometimes people simply can’t make it to meetings, but they can still play crucial roles in organizing while they’re at work.

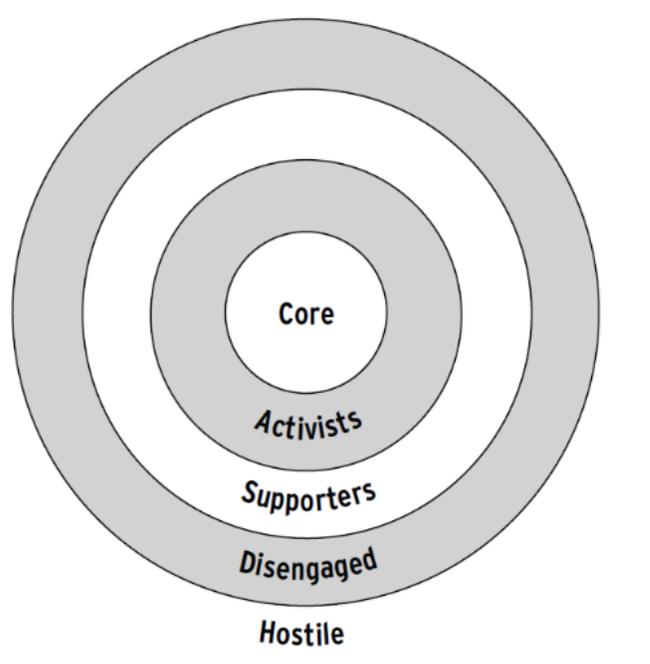
**Discuss:**

1. Which of the common expressions of apathy mentioned in this resource can you relate to? Give a concrete example from your experience.
2. Identify at least one strategy in the resource that you can see yourself using. Strategies are found in the sections titled What to do.

Reproduced and adapted from Labor Notes, *Secrets of a Successful Organizer Handouts* - <https://labornotes.org/secrets/handouts>

## HANDOUT 9

### Aim for the Bullseye

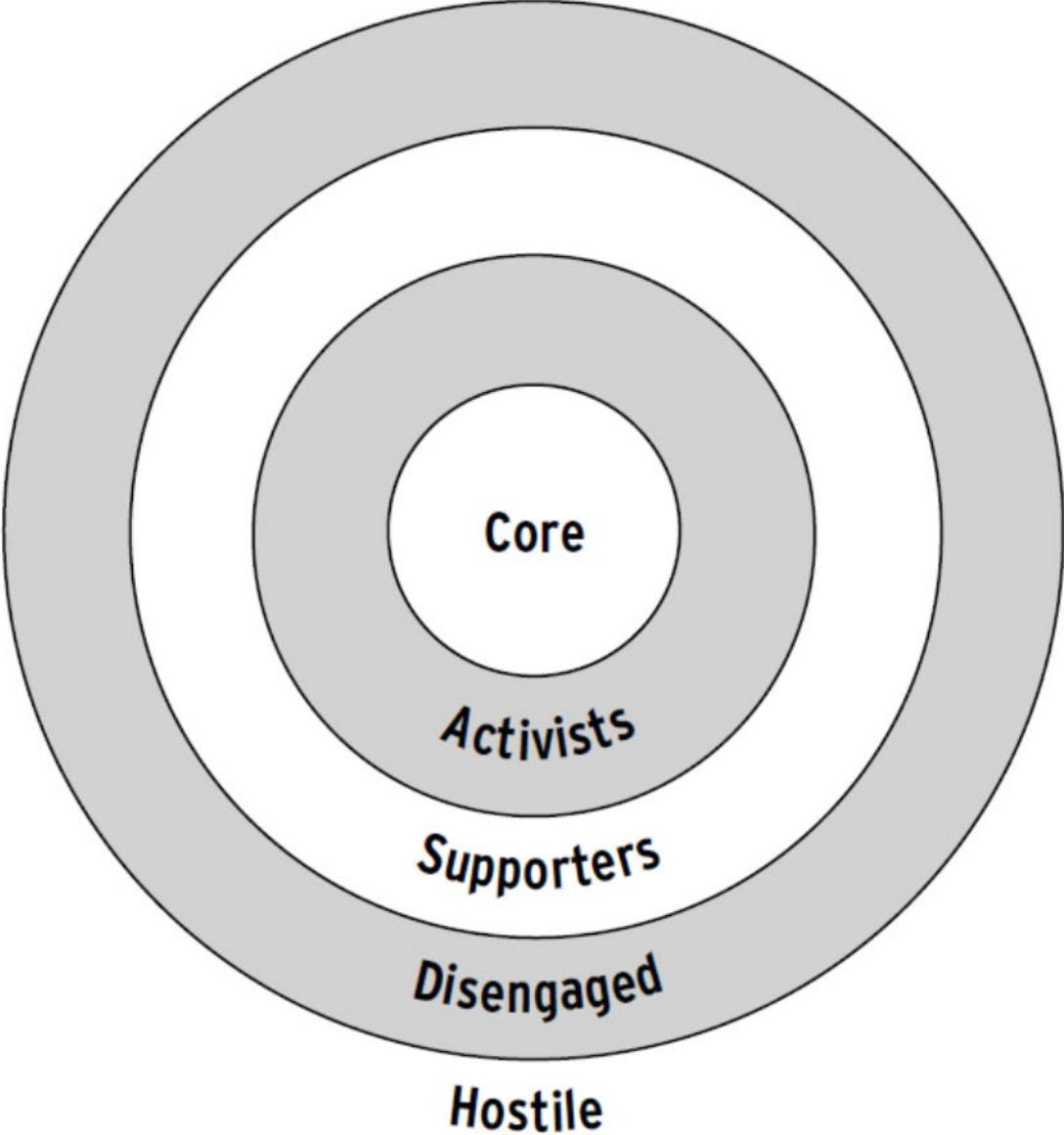


From the organizer's point of view, think of your fellow members distributed on a dartboard. Your goal is always to move people one step closer to the center of the circle.

- **Core group:** These people 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.
- **Activists:** These people can be counted on to help when an issue heats up. They will take responsibility to get the word out and will ask other people to take action, too.
- **Supporters:** These people will wear a button or sign a petition, but don't take responsibility for getting anyone else involved.
- **Disengaged:** These people don't see the union as a factor in their lives, so they don't participate.
- **Hostile:** There are also people outside the circle who aren't just uninvolved—they're hostile to the union. Don't waste your time arguing with the haters. Maybe one day something will open their eyes, but it'll probably be an experience, not a debate, that does it.

Reproduced and adapted from Labor Notes, *Secrets of a Successful Organizer Handouts* - <https://labornotes.org/secrets/handouts>

HANDOUT 10  
Fill in Your Own Bullseye



## HANDOUT 11

### You're Different, And That's Okay

- Don't set the bar too high. You can't send a message that to be involved in the union, people have to be like you. They'll shy away. Making a meaningful contribution shouldn't require devoting all their days and nights. Instead, help everyone find their own levels of involvement. And as you take on different fights, don't be surprised when people move between roles - sometimes acting as leaders, other times hanging back.
- It's crucial for the organizer to understand that the concentration of coworkers in the outer rings isn't a sign of failure. Most of your coworkers won't ever become dedicated union volunteers, day in and day out.
- Even in winning campaigns, the planning, the strategizing, and a fair share of the grunt work are typically carried out by a handful of members: the core group. The activists and supporters join in as needed, and a lot of the people who are usually disengaged play a part when the stakes get highest - for example, during a strike.
- But you probably do need more people to join you in the core group, and more supporters to step up as activists. "More hands on the plow," as master organizer and Auto Workers rabble-rouser Jerry Tucker used to say. Union veterans will tell you that a good goal is one activist or steward for every 10 workers, including at least one on every shift and in every department or work area.
- **Your organizing task is, how are you going to move more people toward the center of the bullseye?** Help them take one step at a time, moving from being disengaged to supportive, or from support to activism, or from activism to taking on core responsibilities. Never make your core group an exclusive club.

Excerpt: Lesson #4 from Alexandra Bradbury, Mark Brenner, and Jane Slaughter, *Secrets of a Successful Organizer*, Labor Notes, 2018.

## HANDOUT 12

### Tips for the Chairperson

Order of business is often determined by the Local/Branch Bylaws. This is a general script to follow.

#### 1. CALL TO ORDER

Ensure you have quorum and start your meeting on time.

**Chairperson says:** *“Order, Please! Seeing that we have quorum, I now declare this meeting of Local/Branch # \_\_\_\_\_ of the \_\_\_\_\_ Component (or “PSAC” for DCLs) open so we can conduct the official business of the Local/Branch.”*

#### 2. INTRODUCTION OF EXECUTIVE OFFICERS

**Chairperson says:** *“The Officers of the Executive will now be introduced.”*

Introduce each member of the Executive Committee.

The Secretary should record their attendance for the minutes.

If there are any invited guests (Component Representatives – NVPs or RVPs, PSAC REVP, PSAC Regional Representative), they should also be introduced and recorded.

#### 3. READING AND APPROVAL OF MINUTES FROM PREVIOUS MEETING

**Chairperson says:** *“The Secretary will please read the minutes of the last meeting”.*

Secretary stands while reading and makes sure the members in the rear can hear.

**Chairperson says:** *“Are there any errors or omissions in the minutes?” (pause) “If not, the Chair will accept a motion.”*

#### Note:

- a. If there is a correction to the minutes, a simple majority vote of the meeting is necessary to make the correction.
- b. Business referred by the minutes to this meeting are dealt with under Unfinished Business and will be read out by the Secretary then.

#### 4. TREASURER’S REPORT

**Chairperson says:** *“The Treasurer will make his report on the financial condition of the Local/Branch”.*

Treasurer stands and make the report and moves its acceptance.

**Chairperson says:**

*“You have heard the Treasurer’s report, and s/he has moved acceptance. Do we have a seconder?” (pause)*

*“The motion has been seconded. Is there any debate?” (pause)*

Deal with any debate on the financial report and follow the rest of the process as set out in Motion Procedures.

## 5. INVOICES AND CORRESPONDENCE

**Chairperson says:** *“Are there any invoices or correspondence to be dealt with?”*  
Secretary responds accordingly.

**Chairperson says:** *“You have heard the recommendation of the Executive Committee {for invoice} to pay \$\_\_\_\_\_ to (name) for (item).”*

OR {for correspondence} *“to (whatever recommendation is).”*

Then follow the “motion” process and then repeat for each invoice and piece of correspondence.

**Note:** examination of and recommendation about all invoices and letters or correspondence should be made by the Executive before the Local/Branch meeting.

## 6. PRESIDENT’S AND COMMITTEE REPORTS

All reports should be in writing. Committee reports should be concise and to the point.

**Note:** When the President gives her/his report, s/he will need to vacate the Chair to the Vice-President, who will chair the meeting until the President’s report has been adopted, at which point the President will resume as Chair.

**Chairperson says:** *“Will the Chairperson of the \_\_\_\_\_ Committee please come to the front and make your report?”*

Committee Chairperson reads the Committee Report and moves its adoption, then it is normally seconded by a committee member.

**Chairperson says:** *“The Committee’s report has been moved and seconded. The floor is now open for debate.”*

Follow the rest of the motion process. Repeat for each committee.

## 7. UNFINISHED BUSINESS

Unfinished business (sometimes called “Business Arising”) are items that have been before the Local already, either from “New Business” at a previous meeting or from earlier in the present meeting referred to this part of the agenda.

**Chairperson says:** *“Is there any unfinished business?”*

The Secretary will read out the item(s) {one at a time} which should now be brought to the attention of the members at this meeting.

For each item, the **Chairperson says:** *“Will someone please move this item?”* (pause) *“Secunder?”* (pause) *The floor is now open for debate.”*

Follow the rest of the motion process.

**Chairperson says:** *“Is there any further unfinished business?”*

Repeat the above process until there is no further unfinished business.

## 8. NOMINATIONS AND ELECTIONS

**Chairperson says:** *“The next item of business is the nomination and election of officers.”*

The Chairperson turns the chair over to the Chairperson of the Nominations Committee to conduct the nominations and elections.

Prior to commencing the nomination process, the Committee Chairperson should read out the rules for nominations and elections from the

Branch/Local Bylaws and make the following points clear to the members:

- a. Nominees must be members in good standing of the Local/Branch.
- b. Nominees must express their willingness to serve and perform the duties if elected.
- c. Elections will be decided by a simple majority.
- d. Term of office will be in accordance with the Bylaws (normally 1 or 2 years).
- e. Elected officers are expected to set an example by attending meetings.
- f. The oath of office will be administered to all officers immediately before taking office.

## 9. NEW BUSINESS

New Business is that which is brought up for the first time at a meeting. It may come from recommendations in the various committee reports, from letters, invoices or from any member on any subject.

**Chairperson says:** *“We will now deal with any new business.”*

Items will be brought up (if any) and the Chairperson will deal with them by applying the

normal rules of order; dealing with each item as it is raised, moved and seconded and following the motions process.

## 10. ADJOURNMENT

Many Locals/Branches have an adjournment time in their Bylaws. When that time is reached, a motion to adjourn is in order. If there is no specific adjournment time, then when all the New Business has been completed, the

**Chairperson says:** *“Having completed our business, a motion to adjourn would be in order.”*

When this action has been completed, the

**Chairperson says:** *“This meeting of Local/Branch # \_\_\_\_\_ of the \_\_\_\_\_ Component or PSAC (for Directly Chartered Locals) stands adjourned.”*

### Appendix:

#### A - Motions Process

The process of moving an item whether it is a report, the minutes of a meeting, unfinished business or new business is generally the same. The wording should be tailored to the specific situation, but the process is straightforward.

1. State what the item is
2. Ask for someone to move the item
3. Ask for a seconder
4. State that the item having been duly moved and seconded is on the floor for debate
5. Hear the debate (each speaker in turn gets to speak once, second time they speak closes debate)
6. Once all the speakers have spoken, call the question ... if necessary, repeat the motion verbatim
7. Ask for all in favour to show ... do a quick count
8. Ask for all opposed to show ... do a quick count
9. Determine if the motion passes or is defeated ... usually needs a simple majority
10. Declare that the motion has passed or been defeated
11. Repeat Steps 1-10 for each item

## **B - Oath of Office**

"I (*Name*) having been elected an officer of (*Local / Branch*) (*number #*) of the (*Name of Component if applicable*) Component of the Public Service Alliance of Canada, solemnly declare that for my term of office I shall fulfill the duties of such office, will maintain and uphold the dignity of the Organization, and will always keep confidential all matters concerning the affairs of the Organization that are brought to my attention."

## **C - Principles of Effective, Responsible Leadership**

- Know your facts.
- Work your problems through - what can you do? what can't you do? what should you do?
- Parcel the job out. Make sure everyone knows what they need to do.
- Tell the people who are doing the job how they are doing. Give each person proper credit.
- Help each person on the job. Give them suggestions, not orders.
- Don't make decisions that involve other people without talking it over with them first.
- Use each person's abilities; don't overload anyone; don't expect too much of anyone.
- Follow through on each job yourself. If a job isn't done, don't chastise anyone but try to establish the reason for non-completion so you can do better in the future.
- Let the people who did the job, make the reports, and get the credit.
- Work from a long-range plan which should be discussed and recommended by the Executive Committee to the members.
- Take time for yourself and don't take on too much. Practice self-care.

## HANDOUT 13

### A Template for Local Meeting Minutes

**Meeting Title** (Annual General Meeting, Special General Meeting, etc.)

**In Attendance:** (list the names of the meeting participants)

Regrets: (list the names of those who weren't able to attend the meeting and sent their regrets)

**Date and Time:** (that the meeting began)

**Agenda:** (that was approved at the meeting)

1. **Previous Minutes:** (amendments (if any) and approval of previous meetings' minutes)
2. **Business Arising from Previous Minutes:** (a summary of decisions)
3. **Reports:** (the name/title of the report; the report itself can be included as an attachment, if desired)
4. **New Business:** (a summary of decisions)
5. **Next Meeting:** (date, time and location of the next meeting)
6. **Adjourned:** (time that the meeting adjourned)

NOTE: If "Rules of Order" are used, the minutes may also include the specific wording of motions and the names of movers and seconders), the details of recorded votes, etc.

REMEMBER - Meeting minutes are not a verbatim transcript of everything that was discussed; they should be an informative recap of discussions and decisions.

### A Template for Union Reports

**Date**

**Title of report** (e.g. President's Report)

**Name and position**

**Union body the position is reporting to** (e.g. Local XXXXX – PSAC)

**Body of report**

- Note of appreciation for those who assisted in the term that just ended.
- Brief summary of activities conducted by this position over the term.
- Comments on upcoming activities/challenges on the horizon.
- Encouraging members to get involved in their union.
- Indication of future plans. (e.g. plans to run again for this position or a different position)

**Closing comments**

**Space to sign report**

HANDOUT 14

Sample - Annual Budget Report

Local: \_\_\_\_\_

For the Period January 1, 20\_\_\_\_ to December 31, 20\_\_\_\_

**Revenues**

- Rebates \$
- Interest \$
- Other investment income \$
- Other \$

**Total Revenues** \$

**Expenses**

Meeting Expenses

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Donations\*

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Event/Project Expenses

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Other

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

**Total Expenses** \$

**Income (Loss)/Profits** \$

Approved by:

\_\_\_\_\_  
President

\_\_\_\_\_  
Treasurer

## Sample - Annual Financial Statement

Local: \_\_\_\_\_

For the Period January 1, 20\_\_\_\_ to December 31, 20\_\_\_\_

Bank Balance, as of January 1, 20\_\_\_\_ \$

### Revenue

Rebate \$

Other:

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

**Total Revenue** \$

### Expenses

Meeting Expenses

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Donations

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Event/Project Expenses

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Other

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

**Total Expenses** \$

**Total Profit (Loss) \$**

Less Outstanding Cheques

- \_\_\_\_\_ \$
- \_\_\_\_\_ \$

Bank Balance, as of December 31, 20\_\_\_\_ \$

**Certified Correct:**

**Signature:**

---

Treasurer

**Auditor's Report:**

We have examined the Financial Statement of Local \_\_\_\_\_ for the period ending December 31st, \_\_\_\_\_.

Our examination included a review of the accounting procedures, revenue and expenditures and such tests of accounting records and other supporting evidence as we considered necessary and in accordance with the Local's By-Laws. We have also verified the Local's Bank Account; and the Bank Balance has been reconciled with the Financial Statement as of December 31st, \_\_\_\_\_.

In our opinion, this Financial Statement presents the true Financial Position of Local \_\_\_\_\_, as on December 31st, \_\_\_\_\_, in accordance with generally accepted accounting principles.

**Signature:** \_\_\_\_\_

**Approved by the Annual Meeting held on:** \_\_\_\_\_

**Copy of Minutes or extract of minutes adopting Financial Statement attached.**

## HANDOUT 15

### Union-Management Meetings: Minimum Standards

#### **Meeting times**

- Joint meetings should take place during work hours.

#### **Pay**

- Union Representatives should receive normal pay for joint meetings and should be allowed work time, with pay, to prepare for and follow-up on such a meeting.

#### **Good faith and goodwill**

- There should be good faith and goodwill on both sides.
- The meeting process should not be subverted for other reasons.
- Most importantly, the process must not be simply an exercise to fulfill requirements of the law or the collective agreement.

#### **Information sharing and confidentiality**

- The parties should share whatever information is reasonably necessary to allow meaningful and effective participation in a joint meeting process while ensuring that confidentiality requirements are met.

#### **Preparation**

- Both parties should be well prepared in advance of joint meetings and should be committed to implementation of meeting outcomes.
- Where parties are unable to come to agreement, respective positions should be clearly understood and any common ground or proposals for resolution should be clearly identified and captured, in writing, before ending joint discussion.

### **Standards Specific to Joint Committees**

#### **Laying the groundwork**

- Joint committee members should develop terms of references together.
- Establish clear objectives should be established from the outset.
- Ensure that participants have clear mandates, influence over the outcomes, and a stake in implementation of actions jointly agreed-upon.
- Where possible, the parties should develop both short and long-term plans and strategies for joint work.

#### **Values**

- Mutual respect for the legitimacy and point of view of all parties is basic to successful joint meetings.
- Parties should come to joint meetings fully prepared to:
  - initiate proposals for discussion
  - review and consider of proposals

- formulate informed responses and/or alternatives to proposals
  - provide effective advice on any steps necessary to achieve joint objectives resulting from proposals.
- When joint committee work does not lead to agreement, participants should hold themselves accountable for the results.

### **Resources**

- There should be a commitment of adequate time, resources and necessary supports for joint work.
- Appropriate training should be provided to joint committee members.
- Union Representatives should be given time, with pay, to perform their duties as a member of a joint committee. This includes preparation for meetings, implementation of meeting decisions and necessary consultation with union members

HANDOUT 16  
 Checklist: Meetings with Management

List things to do and to avoid at each step in the process of meeting with management.

Step	To do	To avoid
<b>1- Preparing your case</b>	<ul style="list-style-type: none"> <li>• Identify and write down your objectives</li> <li>• get any necessary facts on the issue and make sure to check them</li> <li>• get membership input, where appropriate, before meeting with management</li> <li>• consult relevant collective agreements, policies and rights</li> <li>• identify key arguments and counter-arguments</li> <li>• plan fallback positions or best case alternatives</li> <li>• be sure that everyone going into the meeting or concerned with the issue is informed in advance</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• attending the meeting unprepared</li> <li>• attending the meeting without determining how members will be impacted and their views on the issue</li> <li>• assuming that you know what all members think on every issue</li> <li>•</li> </ul>
<b>2 – Teamwork</b>	<ul style="list-style-type: none"> <li>• Meet as a caucus before the meeting to plan your strategy</li> <li>• share prep work and all relevant findings in advance of the meeting</li> <li>• ensure that you agree on arguments and tactics</li> <li>• choose a lead speaker in order to maintain continuity</li> <li>• make sure someone agrees to take notes before going into the meeting</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting without ensuring that your group is on the same page</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>3 – Meeting with management</b>	<ul style="list-style-type: none"> <li>• ensure there is agreement on who is doing what in the meeting</li> <li>• use adjournments when necessary (caucus)</li> </ul>	<ul style="list-style-type: none"> <li>• Personal attacks</li> <li>• Losing your temper</li> <li>• Using insulting language</li> <li>• Being taken in by flattery</li> </ul>

	<ul style="list-style-type: none"> <li>• steer discussion to your stronger points</li> <li>• look out for management offers</li> <li>• make sure there is an agreed-upon, written record of your meeting</li> <li>• know when you have a deal and be sure it is one that meets union members' primary objectives of the union</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Disagreeing with other union representatives in front of management</li> <li>• Making promises you cannot keep</li> <li>•</li> </ul>
<b>Step</b>	<b>To do</b>	<b>To avoid</b>
<b>4 – Follow-up</b>	<ul style="list-style-type: none"> <li>• Check in with your team to be sure everyone is on the same page about what happened in the meeting</li> <li>• establish who will be responsible for follow-up measures</li> <li>• identify all follow-up necessary to <ul style="list-style-type: none"> <li>○ ensure implementation of any issues that are resolved</li> <li>○ mobilize members to support any unresolved issues</li> </ul> </li> <li>• ensure minutes are finalized and distributed</li> <li>• identify anything you need as a result of this meeting</li> <li>• Check in with management to ensure they follow-up on their commitments</li> <li>•</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>5 – Membership Support on key issues</b>	<ul style="list-style-type: none"> <li>• inform members of key issues discussed (meeting, bulletin, etc.)</li> <li>• inform members of any agreements with</li> </ul>	<ul style="list-style-type: none"> <li>• Deprioritizing communication with members</li> </ul>

<p>There is a key connection between membership support and effective face to face meetings with management.</p>	<p>management and ensure they support the Executive decisions before agreement or implementation</p> <ul style="list-style-type: none"><li>• mobilize members around key issues so that they will take action where necessary to support the unions positions</li></ul>	<ul style="list-style-type: none"><li>• Assuming that no one wants to support the work</li><li>•</li><li>•</li></ul>
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## HANDOUT 17

### There Are No Shortcuts

What we need to do is often simple, but not easy.

It's hard to carve out time for conversations, really listen, and keep chipping away at obstacles that take time to overcome.

It's often tempting to seize on something that promises quick results. Maybe this new cellphone app will get our co-workers excited about the union! If we start ordering pizza for our meetings, everyone will come! But what sounds too good to be true, probably is. The basics of organizing don't change. You can't wave a magic wand and instantly get power on the job. That only comes by doing the patient work of building relationships, identifying issues, and running campaigns. As famed organizer Fred Ross put it:

*"Shortcuts usually end in detours, which lead to dead ends."*

Here are a few examples of shortcuts that will work against you in the long run:

- Solving the problem yourself by going to management alone, instead of getting coworkers to come with you.
- Continually relying on the same leaders, instead of developing new ones.
- Shutting down bad ideas, instead of asking questions that help your coworkers realize why the idea won't work - or sometimes even letting them make their own mistakes.
- Using Facebook to "invite" people to a union activity, instead of having a personal conversation.

The Puerto Rican teacher's union spent years fostering a culture of democracy, developing grassroots leaders, and forging relationships between teachers and parents. The teachers did it through many small fights, on issues like smaller classes, asbestos removal, school supplies, and water fountains.

All this painstaking spadework enabled the union to strike for 10 days in 2008, in defiance of the law, and then to defeat a raid by a much wealthier union that dumped tens of millions of dollars into the attempt. As President Rafael Feliciano Hernandez put it at the time: *"The long way is the short way."*

*Excerpt: Secret #6 from Alexandra Bradbury, Mark Brenner, and Jane Slaughter, Secrets of a Successful Organizer, Labor Notes, 2018.*