



Steward Notes

VOL. 8 • ISSUE 2 • SPRING 2015



Write it all down!

Documentation is key to efficient grievance handling

by Merryn Edwards
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Union stewards play an essential role in resolving complaints and grievances quickly at the lowest level possible. Good documentation in the early stages of a problem can be a deciding factor in preventing unnecessary losses, especially when the number of technical challenges posed by employers is on the rise.

Whenever a situation arises that could lead to potential discipline or grievances, it is crucial that union stewards keep good notes. Sometimes, what seems like an inconsequential meeting can lead to further action down the road, up to and including dismissal. In such cases, a steward's notes could be used in subsequent grievances, including arbitration.

Timeliness in filing grievances, gathering documents and keeping meaningful notes are imperative to ensuring that the union fulfills its duty of fair representation to its members. Recording dates is particularly important in ensuring that you are adhering to the timelines laid out in the collective agreement.

You also need to record who is present at any meetings, including their full names and titles, and verify that you have their current contact information.

Your notes should accurately reflect who said what and describe the nature of the discussion. It can be tricky to do this in the midst of a meeting, so it's a good idea to take a few minutes on your own afterwards to review your notes and add in any details you may have missed.

You will need to keep your files updated, including copies of all correspondence given to the member by the employer and descriptions of any actions taken against the member by the employer. Ideally, you should be able to hand over a complete file to an MSO at any time so they can pick up where you left off. That means your notes must be legible too!

Certainly, not all interactions a steward has with members or employers need to be documented. Many times, a steward will be able to support members by helping to interpret the collective agreement or advising them about the

benefits and services of the union, such as the Member Benevolent Fund, education bursaries or counseling services.

And not all interactions with the employer require a steward's presence. The employer has a right to talk to employees without union representation about job-related issues such as operational changes that are not disciplinary.

But as soon as a situation arises that could potentially lead to grievances or discipline—start taking notes! If you are unsure, don't guess—get in contact with your MSO through the AUPE Resource Centre. Your MSO can give you guidance on filing grievances, including considering the impacts of precedent decisions or arbitrations.

If a grievance does proceed beyond your scope as a union steward, your accurate, detailed notes will ensure the MSO won't have to start all over from scratch. ■

best practices for documentation

- Include the date, time and location of the meeting.
- Include the full names and titles of everyone present.
- Notes should be legible and accurately reflect the nature of the discussion.
- Make copies of all correspondence given to the member by the employer and/or describe any action taken against the member by the employer.
- Verify that you have up-to-date contact information for everyone involved.



HAVE QUESTIONS?

CONTACT YOUR MEMBER SERVICES OFFICER

CALL 1-800-232-7284

Have your local/chapter number and worksite location ready so your call can be directed quickly.





Building trust and protecting privacy

Like a lawyer or a psychologist, union stewards must uphold the principle of confidentiality

Sensitive medical information including details of mental illness or addiction; attendance, disciplinary, or performance records at work; delicate situations involving family or personal crises...union stewards can definitely come to learn a lot about the members they represent.

Doctors, lawyers, and psychologists who also deal with sensitive personal information are bound by detailed confidentiality rules and professional codes of conduct. Union stewards do receive training on how to properly represent members, but unlike outside experts, a steward's role is more focused on providing peer-to-peer support for coworkers and other members.

The peer relationships that stewards build at work can be a key factor affecting the connection (or lack of connection) members have to the overall union, including ensuring success in bargaining. And as with any good relationship, trust is fundamental.

Even if you do not divulge a member's name, stewards should be aware of how and where they discuss the details of grievances or other personal information. Another member who overhears a steward discussing a grievance in an elevator, for example, may be deterred from approaching a steward in the future.

You should assure members that the information they share with you will be kept confidential unless you have

secured their permission to share it with others. For example, you should explain that you would need to consult with your MSO before filing a grievance, but reassure members that MSOs are also bound to uphold confidentiality.

Good communication with your members will help to avoid misunderstandings. If you let a member know ahead of time that you will be discussing his/her information with an MSO or other union representative, you will build trust by demonstrating your commitment to confidentiality.

Stewards and all union representatives are also bound to keep contact information for members confidential. When gathering contact information from members, make sure you have clearly explained why you are gathering the information and have stated if you will share the information with any other people.

Before sending out any mass communication with members, contact your MSO or seek advice from AUPE Communications to ensure that you are in compliance with all relevant privacy and spam legislation. ■



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Any member can take the *Introduction to your Union* and *Contract Interpretation* courses. Other courses are reserved for Union Stewards and Officers.

To take your union education further:

- 1) **Go online.** www.aupe.org/member-resources/education/
- 2) **Choose.** Find a course.
- 3) **Register.** Call 1-800-232-7284 and ask to speak with the course registration desk.
- 4) **Confirm.** Once a course has met the required numbers, a location will be chosen based on the postal codes of registered members and you will be contacted with the date and location.

Steward Notes is published by the Alberta Union of Provincial Employees to provide information of technical interest to AUPE Union Stewards, worksite contacts and other members. Topics deal with training for union activists, worksite issues, disputes and arbitrations, health and safety, trends in labour law, bargaining and related material. For more information, contact the editor.

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The goal of Steward Notes is to help today's AUPE Union Stewards do their jobs effectively. To help us, we encourage readers to submit story ideas that deserve exposure among all AUPE stewards.

Story suggestions for Steward Notes may be submitted for consideration to Communications Staff Writer Merryn Edwards by e-mail at m.edwards@aupe.org or by mail. Please include names and contact information for yourself and potential story sources.

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