

## #1 Advanced Representation Training for Stewards Participant Agenda



### Day One

1. Session Opening
2. Steward Role and Responsibilities
3. Steward as an Organizer
4. Legal Considerations for Stewards
5. Options for Problem-solving
6. Wrap-up

### Day Two

1. Check-in
2. Introduction to Case Scenario Exercise
3. Case Scenario Exercise Steps 1 to 4 - Fact Finding and Building a Case
4. Wrap-up
5. Optional Evening Session

### Day Three

1. Check-in / Getting Started
2. Case Scenarios, Steps 5 to 9  
Preparing a case and Grievance Representation
3. Case Scenarios Wrap-up

### Day Four

1. Check-in
2. Panel Presentation
3. Talking with the Experts
4. Speed Problem Solving Round
5. Course Closing

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## #2 – Course Evaluation

1. Did the course meet its objectives? Yes \_\_\_ No \_\_\_

Please explain:

2. What were the highlights of this course for you?

3. What could we have done better?

4. What were you most pleased about contributing?

5. What are your thoughts about the materials and resources that were made available to you on the course?

6. Were the exercises and facilitation conducive to a positive learning experience for you? Yes \_\_\_\_ No \_\_\_\_

Please explain:

7. Do you feel better equipped to be a Union Steward?  
Yes \_\_\_\_ No \_\_\_\_

Please explain:

8. Other (we welcome any other feedback on the course content, process and/or facilitation that you would like to provide):

Name: \_\_\_\_\_

## **#3 PSAC STATEMENT ON HARASSMENT**

Our union is made strong by Sisters and Brothers 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, family status, criminal record, disability, sexual orientation, gender identity or expression, language, social and economic 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 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 #4 on reverse***

## **#4 PSAC STATEMENT ON SCENT-FREE ENVIRONMENTS**

The Public Service Alliance of Canada is committed to ensuring that all members with disabilities are able to effectively participate in order to contribute to the organization's mandate.

In this regard, the PSAC recognizes that accessibility is an essential requirement for the participation of members with environmental disabilities.

In consideration for the health of our Sisters and Brothers who may suffer from environmental disabilities, and with the goal of eliminating a contaminant from the air, **the PSAC requests that all participants attending any union function refrain from using scented products. These include scented perfumes, colognes, lotions, hairsprays, deodorants and other products promoted by the fragrance industry.**

A participant who notices a problem is encouraged to address the person in a cordial and respectful manner. Any unresolved issues may be brought to the attention of the organizers who may investigate and attempt to find a reasonable accommodation.

By working together we can create healthier environments for ALL, and accommodate the needs of persons who have environmental disabilities.

***\*Handout #3 on reverse***

## #5 The Way We Learn Together



- We create a safe space where each of us can feel free to speak up.
- We recognize that we all bring our experiences and knowledge to the discussion.
- We learn from our differences and recognize what we have in common.
- We participate and we encourage others to participate as well.
- We do our best to avoid outside distractions.
- We do our best to be on time.
- We listen attentively and do not distract or interrupt each other.
- We challenge each other respectfully.
- We deal positively with conflict so that if it arises, it enhances our learning.
- We are aware that the language we use may have an impact on others.
- We take responsibility for what we say and for clarifying what others say.

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## #6 Kevin Millsip Video Summaries (courtesy of the Canadian Labour Congress)

### About Kevin Millsip and His Approach

#### Who is Kevin Millsip?

Kevin Millsip is co-founder of Next Up, an organization that provides leadership training for young people who want to make social change their life's work. He is also one of the founders of Get Your Vote On – a non-partisan organization devoted to increasing youth voting in British Columbia – and has been both the sustainability coordinator for the Vancouver School Board, and a School Board trustee. (As a trustee, he drafted a policy strictly forbidding advertising in public schools.) In the together FAIRNESS WORKS train-the-trainer sessions\* we draw heavily on his three-step Go/Listen/Build approach.

#### What is his approach?

Kevin believes strongly in engaging with people, rather than yelling at them or overwhelming them with facts. The keys are to learn more about the people you want to engage with, listen to them, and then build strength through common goals and values.

His approach includes the following three steps:

- ❖ Go to where the people are: Engage with them where they physically are, and at a level that is appropriate to their personal situation.
- ❖ Listen with intention to what they have to say.
- ❖ Build strength, relationships, belonging based on what you have learned.

**Q** It's easy to try to use these three approaches to convince people. But why don't they work?

\*a CLC course

## Kevin Millsip “What Not To Do” Video Summary

*A high resolution version of the video can be downloaded at <http://fairness.clc-ctc.ca/>*

*Username: fairness*

*Password: clc2013*

*Click on the “Resources for Educators” link ... select the 4 Kevin Millsip video links, one at a time.*

This video comes from a talk given by Kevin Millsip at the Canadian Labour Congress’ 2013 Political Action Conference.

He starts by saying that people working for social change have sometimes hurt their causes by attacking each other instead of reaching out to new movements and building bridges and alliances. He then sets out three approaches he and many others have used that are not very effective. Kevin calls them Field of Dreams, Park n’ Bark/Yell and Tell, and Fact-o-lanche.

**Field of Dreams:** This is what happens when we put a lot of time and money into building a movement or campaign and expect people to show up and participate. They don’t because we haven’t consulted them about their hopes and dreams and concerns, and how we can work on these problems together.

**Park n’ Bark/Yell and Tell:** This is the approach we taken when we yell our truth to anyone who will listen. We are right, and they should come along with us, because we know the answers. The trouble with yelling is that people being yelled at tend not to hear the content of the message. What they hear is “You’re wrong” or “You’re stupid” – and they tune us out.

**Fact-o-lanche:** We have a lot of good ideas, and we share an avalanche of facts designed to convince people about how right we are. Millsip says, “I used to think that if I covered people with enough facts ... they’d have a come-to-Jesus moment and see my light.” Instead, people just wind up dazed.

These three approaches may be tempting to use, but they are ineffective ways to promote the value of unions – or anything else, for that matter. Ever try to convince a teenager that something they want to do is a bad idea? No matter how much you explain why they can’t go to an all-night

beach party, you'll likely wind up with them saying, "So why can't I go?" When we get angry with people or try to convince them by yelling or burying them with facts, they just shut down. They feel threatened, and they don't listen anymore.

### **"Go" Video Summary**

Four union activists talk about where they go to reach members and people in the broader community – from the workplace, to the kitchen table, to social media. Kevin Millsip shares the story of the first "Get Your Vote On" campaign in BC, which successfully registered 20,000 new voters. The keys to the campaign were engaging people in conversations about what they cared about, and actively seeking out young people in places they frequented, including cafes, buses, bus stops, and lineups outside clubs.

### **"Listen" Video Summary**

Union activists talk about the importance of having conversations with members, allowing them to voice their opinions, and listening to their concerns.

Kevin Millsip uses the phrase "I'm here to hear," and says that authentic listening builds space for the development of trust. He notes that you can begin to find common areas of concern with other people by listening, making connections, and then forming relationships that come out of trust. That leads to action and to building new power.

### **"Build" Video Summary**

One union activist talks about protecting the middle class, and another says he sees union membership as the basis for building a society founded on fairness.

Kevin Millsip stresses the importance of a sense of belonging, and says that isolation is a concern for many. Isolation can lead to uncertainty and fear, and in that state, people are more susceptible to simplistic, non-progressive actions. Connections build solidarity and allow us to work together instead.

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## **#7 Legal Definitions for Stewards (Separate Handout)**

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## #8 Factors Considered When Disciplining an Employee

[http://www.labour.gc.ca/eng/standards\\_equity/st/pubs\\_st/unjust.shtml](http://www.labour.gc.ca/eng/standards_equity/st/pubs_st/unjust.shtml)

Employers should take into account eight factors before taking disciplinary action:

1. **Seriousness of the problem** Did the action of the employee have major or minor consequences for the employer? Was the employee aware of the consequences?
2. **Frequency of the problem** Is this type of misbehaviour common among other employees?
3. **Time since last infraction** Does the employee have a history of this type of behaviour, or was the incident a first offence?
4. **Employee's work history** Has the employee performed his or her job satisfactorily in the past?
5. **Extenuating or mitigating factors** Was the employee facing pressures such as personal problems or provocation which may have led to the improper behaviour?
6. **Degree of orientation** Were the work place rules clearly explained? Had the employee been informed about the employer's expectations concerning job performance?
7. **History of organization's disciplinary practice** Has the employer dealt consistently with similar offences in the past?
8. **Implications for other employees** What effect did the employee's action have on the attitudes or actions of colleagues?

Adjudicators refer to "**aggravating**" and "**mitigating**" factors to determine the type and severity of disciplinary action appropriate for the offence, as well as whether or not the dismissal is just.

These elements are taken into consideration when adjudicators evaluate the seriousness of the offence and the corrective measures imposed by the employer. For example, the fact that the misconduct was an isolated and unpremeditated act may mitigate the seriousness of the offence. On the other hand, the fact that the offence had been planned will be considered as an aggravating factor.

Many aggravating and mitigating circumstances have been taken into account by adjudicators to determine whether the disciplinary action taken was appropriate for the offence committed and whether dismissal was justified for that infraction. The following factors have been considered by adjudicators:

### **Aggravating Factors**

- Behaviour irreparably broke the bond of trust that is essential in an employer-employee relationship.
- Employee did not improve after corrective action taken
- Employee refuses to accept responsibility for his or her actions.
- Employee was fully aware that such misconduct was unacceptable.
- Misconduct is unacceptable for the type of business involved.
- Misconduct was intentional and premeditated.
- There was a culminating incident.

### **Mitigating Factors**

- Misconduct was beyond control or dependent on other factors such as provocation.
- Misconduct was committed on the spur of the moment or as a result of an emotional impulse.
- The employer had condoned the employee's behaviour in the past.
- The misconduct did not damage the employer's image.
- The offence was not committed during working hours.
- The penalty imposed was inappropriate for the offence committed.
- There was a lax and permissive atmosphere at the work place.
- The employee admitted wrongdoing.
- The previous disciplinary and work record of the employee was good.
- The employer's rules of conduct had not been uniformly applied.
- The company had not allowed the employee to explain his or her actions.
- Employee's actions were as a result of an error, a misunderstanding or a lack of training.
- Allegations were not known to the employee.
- Infraction was an isolated incident.

## #9 Legal Quiz

1. What is the order in the hierarchy of laws?
  - a. Gravity, Motion, Time/Space
  - b. Charter of Rights and Freedoms, Human Rights Legislation, Collective Agreement, Employment Standards Legislation
  - c. Human Rights Legislation, Charter of Rights and Freedoms, Employment Standards Legislation
  - d. Collective Agreements, Employer Policies, Workplace Practices
  
2. Where do you find the time limit for filing a grievance?
  - a. Employer policy
  - b. Employment Standards legislation
  - c. Collective agreement
  - d. Union Management Consultation Committee meeting minutes
  
3. What can you do if you miss a time limit?
  - a. Ask the Employer to agree to an extension of time limits in writing and forward grievance through the process
  - b. Ignore it and forward the grievance through the process anyway.
  - c. Ask the Labour Board to intervene on your behalf
  - d. Tell the grievor you cannot proceed because you missed a time limit
  
4. When can a steward say “no” to providing representation in a grievance?
  - a. After considering all the aspects of the grievance and the effect on the membership as a whole
  - b. If the grievor is/was a scab
  - c. If you know the grievor hasn't been honest with you
  - d. If the grievor is not a member in good standing

5. When does the union have the initial onus (burden of proof – responsibility to prove their case)?
  - a. A discipline grievance
  - b. An acting pay grievance
  - c. A discrimination grievance
  - d. Both b and c
  
6. What does the Duty of Fair Representation mean?
  - a. Unions have to represent their members in workplace related matters in a way that is not discriminatory, arbitrary or in bad faith.
  - b. Union always have to represent their members no matter what.
  - c. When you attend a fair in Canada, you have to have someone attend with you to talk on your behalf.
  - d. None of the above.
  
7. Who wouldn't you seek advice from on how to word a grievance?
  - a. Your Chief Steward
  - b. Your Regional Vice President
  - c. A PSAC Regional Representative
  - d. Your employer's labour relations officer
  
8. Where will you find provisions that secure your right to represent members?
  - a. The Collective Agreement
  - b. Labour legislation
  - c. Human Rights Legislation
  - d. Both a and b
  
9. What would you argue in a grievance hearing if a member was not afforded representation when called to provide information at an internal harassment investigation?
  - a. A violation of the discipline clause in the collective agreement
  - b. A violation of the principles and practices of due process
  - c. Mitigating factors
  - d. A violation of the duty of fair representation

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## #10 Recourse Route Scenarios

**Following is a series of short scenarios which require a Steward's intervention. Please discuss and choose the route(s) that you think will work best, based on the information provided.**

1. A member has been given a ten-day suspension for insubordination. She refused a direct order to work overtime because she had previously arranged to visit her sick mother out of town.
2. The employer is terminating a long-standing practice of allowing members to merge their lunch and coffee breaks so that they can have a longer lunch-hour.
3. The employer has instigated a new policy on e-mail etiquette but did not consult with the union on its content. Members are upset because it changes the rules about receiving personal e-mail at work.
4. A member feels she has been unfairly screened-out of a job interview because she is pregnant. She has heard from some women in the workplace that the Supervisor in the section she applied for has previously made comments about how difficult it is to have to replace women on maternity leave.
5. A member is very upset that one of his work colleagues (another member) yelled at him in front of his co-workers. Things are very stressful at work because the employer announced they will be cutting back staff in the coming months.

6. The employer has implemented a new electronic system for tracking reports which requires advanced technological skills and has increased the workload by about 25%. Job descriptions in the section don't reflect these new duties.
  
7. A member injured herself at work and as a result has to take time off. She is a fairly new member with very little sick leave accumulated.
  
8. A member has been on sick leave for three months and has advised the employer that she will be returning to work next week. The employer has asked that before returning, she obtain a second medical opinion stating she is capable of returning to work. She doesn't understand why.
  
9. Your supervisor has refused to let you attend a disciplinary meeting with a member; citing operational requirements as a rationale for the refusal. There are no other union representatives in the building.
  
10. There is a really bad smell in the building and members are coming to you complaining that it is making them sick.

**#11 Recourse Route Scenarios Answer Sheet**  
(separate handout distributed after exercise is complete)

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## #12 Case Scenario – Task Sheet

### Overview:

This two day exercise has been designed to help you learn and improve the various skills you will need when representing a member. The task has been separated into nine steps and each step has a specific learning objective. The learning objectives are as simple yet critical as taking the time to prepare for a first meeting with a member (step 1) to as complex as making arguments in front of the employer (step 8).

Every effort has been made to provide similar amounts of information for each scenario. However the reality is that some of the scenarios are more complex than others and thus require more documentation at various steps. If you find that you have completed your task before the rest of the scenarios, please take the opportunity to discuss and problem solve with your partner around cases you have in your local at this time (keeping confidentiality in mind).

### Instructions:

You have been paired-up with another participant. Both of you will be working with the same case file for the next two days. One other team will be working on the same case file as you. It is possible that your approach to representing the member in this situation will be different from that of your counterparts.

If you are the Union Steward today, then your partner will be the member (except for step 1). You will trade roles with your partner so that they can be the Union Steward tomorrow. Today, the emphasis will be on problem-solving and fact-finding. Tomorrow, the emphasis will be on preparing for a grievance hearing. Please talk to your partner and assign roles for today and tomorrow based on maximizing the learning potential for both of you.

This entire exercise will span two days and consist of nine steps. At most (but not all) steps in the process, you will be provided with information relevant to your situation. **Please do not share the documents you receive unless it indicates that all parties are in receipt.**

At various times in the process, we will all come together so that we can share and learn from each other about the varied issues being addressed and about our experiences working the cases up to that point.

## Step One – Preparing to Meet with the Member

Each of you will approach this step from the Steward's perspective. Please read the information you have been provided and take **15 minutes**, on your own, to prepare questions for your interview with the member.

Approach this as you would a first meeting with a potential grievor. What information do you need to glean from this individual in order to be able to assist them? What questions could you ask them? In broad terms what do you need to know to define the issue?

Once you have completed the task, team up with your partner and take another **15 minutes** to compare your questions. Decide between you, which ones the Steward will focus on in the interview with the member.

## Step Two – Interviewing the Member

Allow **15 minutes** for the member to read additional information (where applicable). During this time, the Steward should be organizing his/her file and notes etc. in preparation for interviewing the member.

Team up with your partner for this exercise and take **30 minutes** to practice an interview between the Steward and the Member. At this interview, the Steward will focus on the questions you jointly prepared and on filling out the Steward Fact Sheet.

## Step Three – Post Interview Follow-up

At this step, you will get together with the other team working on this scenario for **30 minutes**. In your small group, brainstorm and make note of what information and preparation is needed from the Steward's perspective in order to prepare for your meeting with management. **Those participants with member information that has not yet been revealed, should not disclose any further information during this process.**

**Pause – Please return to plenary for a debriefing of work on your case up to this point.**

## **Step Four – Meeting with the Employer**

Pair up with the other team working on your scenario. You will conduct two **20 minute** practice sessions where the Shop Steward and member in each team will meet with management.

The practice will be organized as follows:

### Round 1

Team A Steward will practice being the Steward in the meeting

Team A Member will be the member in the meeting

Team B Steward will observe and take notes for feedback

Team B Member will be the employer representative

After round 1, the observer will take **5 – 10 minutes** to provide concrete feedback to the Steward

### Round 2

Team B Steward will practice being the Steward in the meeting

Team B member will be the member in the meeting

Team A Steward will observe and take notes for feedback

Team A member will be the employer representative

After round 2, the observer will take **5-10 minutes** to provide concrete feedback to the Steward

<p><b>Pause – Please return to plenary for a debriefing of work on your case up to this point and for some additional information</b></p>
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**End of Day 1**

## Day 2

### Step 5 – Building a Case

Meet with your partner. Based on the total information you received to this point, take **20 minutes** to:

- determine what additional information, documentation, resources, you need to deal with this situation.
- discuss options for recourse with your partner and list the pros and cons for each.
- discuss if this is a situation that would benefit from workplace organizing in support of the issue or individual; if yes, list some options.

Now get together with the other team working on the same scenario as you. Take an additional **20 minutes** to share and compare what you came up with re: additional follow-up, possible organizing actions and options for recourse.

**Pause – Please return to plenary for some debriefing and discussion about next steps in your case.**

### Step 6 – Filing a Grievance

Meet with your partner and take **15 minutes** to write your grievance.

Now meet with another pair – but this time, someone who is working on a **different** case than you.

You will take **20 minutes** to share your written grievance and the documentation in your grievance file with the other team. Teams will provide each other with feedback on their grievance wording and their file management.

### Step 7 – Grievance Preparation

Meet with your partner and take **30 minutes** to write-up your grievance argument and finalize any file preparation. Make a list of documentation and/or witness statements you will need in your file and why.

This is something the Steward should always do in consultation and collaboration with the grievor – so you will be “in character” during this step. By the end of this step, you should feel prepared to attend the upcoming grievance hearing.

### **Step 8 – Grievance Hearing**

Report back to plenary for grievance hearing practice and debrief.

### **Step 9 – Grievance Transmittal**

Meet with your partner and take **15 minutes** to:

- If your grievance has been resolved, identify next steps in ensuring the settlement is implemented. Finalize your file for Local records.
- If your grievance hasn't been resolved, fill out the form to transmit the grievance to the next level and organize your file for transmittal.

**Pause and return to plenary for final discussion on your grievance file.**

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## #13 Tips for Taking Notes

### Listening to Understand:

- **Listening** is the first step to good note-taking. Listening requires you not only to hear what is being said, but to understand it as well.
- In order to listen well, you should try to **position yourself** in the room where you can both see and hear the speaker.
- To be sure you **understand** what is being said, you will write your notes in your own words and provide definitions for new and/or technical terms.
- When taking notes, if you don't understand something being said, you can **clarify** immediately or write questions for yourself in the margins beside your notes, so that you can seek clarification later.

### Hints on Note Taking:

- **Be Prepared.** Bring everything you need; pad/paper, pencil and pen, highlighters, etc.
- **Designate a Note-Taker.** If you are in a meeting with someone else from the union (member or other Steward), the person taking the lead in asking questions or making an argument, should not be relied on to take notes (but may do so if they choose). Be sure that at least one, experienced and skilled note-taker is taking on that responsibility. Optimally, you will all take notes and share your responses with each other after the meeting.
- Don't keep notes on oddly shaped, loose pieces of paper. **Keep them in order**, in one place. A binder or note-book is preferable. You can put tabs on your notes for later reference.
- Put **page numbers, date and the name of the people in the meeting** on each page. On the first page of your notes, be sure to include the

name and role of all those present (*Union representative(s), member(s), Employer Representatives*) and list relevant documents that will be referenced in the meeting.

- **Set up** your page so you can write down the name of who is speaking and leave space for questions/comments in a margin beside your notes.
- Think about what you want to **focus** on. Why are you here? What are you hoping to gain from this experience? What do you want to share with others? Take notes that will be of real **value** to you when you look at them later.
- Don't be afraid to ask people in the meeting to repeat themselves or to slow down so that you are able to **take copious notes**. This is also a way for you to have more control over the meeting.
- You don't have to write down everything you hear. Be alert and attentive to **main points or new ideas**.
- Use space, titles and key words to **separate ideas**.
- Take **accurate** notes. If you use your own words (instead of verbatim), don't change the meaning.
- If you quote from the speaker – quote correctly and use quotation marks
- Note body language that is significant
- Notes should consist of **key words** and **short sentences**.
- Have a **system** of punctuation and abbreviation that is **consistent** and that makes sense to you.
- Feel free to use arrows and/or symbols as part of your note-taking. Again, be consistent and be sure they make sense to you later.
- Use different coloured inks and/or highlighters to **emphasize important points and/or follow-up**.

- Leave lots of **white space** for later additions to your notes.
- When finished, **review your notes** and fill in the blanks or add additional points where warranted

NOTES:

**Example Notes:**

Meeting date \_\_\_\_\_ Meeting time: from \_\_\_\_\_ to \_\_\_\_\_

Meeting Title (Disciplinary Interview, Jane Doe)

Present at the meeting:

- Jane Doe (member)
- Yusuf Panjwani (Steward)
- Penny Lane (Manager of Operations)
- Sean Ying (Senior Labour Relations Officer – Employer)

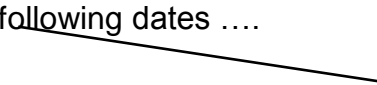
Related documents:

- Disciplinary Notice

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PL – reason for disciplinary hearing (reads from notice of discipline – attached)

Main issue is tardiness. On the following dates ....

**\*\* Check  
with JD about the  
following two  
dates.**



What do you have to say for yourself Jane?

YP – asks for a break

**After break**

YP - will speak for Jane then see if she has anything to add ....

Jane – do you have anything to add?

JD – just one thing ....

SY – will consider what you have said and let you know if discipline will be invoked.

YP – timeline?

SY – by \_\_\_\_\_ (date)

**Note – check personnel file and ask JD about any additional mitigating factors for lateness.**

## #14 Steward Factsheet (also available on the PSAC website)



The PSAC encourages, when possible, resolving an issue at the source – with the affected parties and as early as possible.

Should an early resolution not be achieved, a complete case file is required in order to facilitate effective representation. Please use this fact sheet to collect information on the issue or problem. This will help you ensure that the grievance process and timeframes have been respected.

### A. THE PARTIES

#### 1. Union Representative (Who completed the fact sheet)

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Work Address: \_\_\_\_\_

\_\_\_\_\_

Phone Home: \_\_\_\_\_ Work: \_\_\_\_\_

Fax:\* \_\_\_\_\_ Email:\* \_\_\_\_\_

Component/DCL: \_\_\_\_\_ Local: \_\_\_\_\_

#### 2. Grievor(s)/Complainant(s) (If more than one, attach list with name, address, etc for each)

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Work Address: \_\_\_\_\_

\_\_\_\_\_


Phone Home: \_\_\_\_\_ Work: \_\_\_\_\_

Fax:\* \_\_\_\_\_ Email:\* \_\_\_\_\_

Bargaining Unit: \_\_\_\_\_ Classification: \_\_\_\_\_

Employer or Department: \_\_\_\_\_ Branch or Section: \_\_\_\_\_

\* Please note that the employer can access your communications, whether by email or fax. Also, email traffic might fall under the "use of employer facilities" policies and could be disclosed through an access to information request.

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## A. THE PARTIES

### 3. Employer Representative or Immediate Supervisor

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

What is relation to grievor/complainant?: \_\_\_\_\_

## B. FACTS OF THE COMPLAINT OR GRIEVANCE

**Why is this considered to be a complaint or grievance?** Include the article of the collective agreement or section of the legislation, if applicable.

This is considered a grievance because the supervisor just walked into the lunch room and called the employoyee vva

**Details Please.** Please provide details of the complaint or grievance and attach a chronology of events if necessary.

a) **What** occurred?

b) **When** did the act or omission occur (times and dates)?

c) **Where** did it occur (location, department and section)?

d) **Who** is involved (other than witnesses)?

e) **Any related documents** (provide title, source, when received)?

**Want (Corrective action requested)**

This should place the complainant(s) or grievor(s) in the same position in which they would have been, had the incident not occurred. (Do not forget to request that the grievor(s) be made whole).

If there are human rights related grounds associated with this complaint or grievance, please ensure you provide details.

**C. WITNESS(ES)**

(If more than one, attach a list with details for each)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email:\* \_\_\_\_\_

Union Witness  Employer Witness |  Provided Statement |

Willing to testify:  Yes  No  Unknown

**D. TIME LIMITS**

1. Date of incident: \_\_\_\_\_

2. Deadline for filing grievance/complaint: \_\_\_\_\_

3. Date filed: \_\_\_\_\_

4. Deadline for reply: \_\_\_\_\_

5. Date reply received: \_\_\_\_\_

6. Deadline for transmittal to next level: \_\_\_\_\_

7. Date transmitted to next level: \_\_\_\_\_

## E. EXTENSION OF TIME

Please provide details if extensions were requested/received at any level of the grievance procedure and attach supporting documentation.

## F. COMMUNICATION WITH COMPONENT/DIRECTLY CHARTERED LOCAL (DCL)

**COMPONENT LOCALS** must ensure they provide details regarding replies to grievances and transmittals to their Component.

**DIRECTLY CHARTERED LOCALS (DCLS)** must ensure they provide details regarding replies to grievances and transmittals to their PSAC Regional Office.

## G. GRIEVANCE FILE CHECKLIST

ATTACHMENTS	YES	NO	N/A
Copy of legible grievance form (retype wording and attach if not legible) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Copy of legible transmittal form (level 2) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Copy of legible transmittal form (other levels) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agreement(s) to extend time limits .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appropriate referral notice or form (arbitration/adjudication).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer's response (level 1).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer's response (level 2).....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer's response (other levels) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outline of arguments presented at all levels of the grievance hearing .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
List of jurisprudence cited at all grievance hearings.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed Steward Fact sheet.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Copy/summary of any settlement offers.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contact with grievor (dates and brief summary) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Copy of all pertinent documents in chronological order (attach a list) .....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

EXPLANATIONS FOR BOXES CHECKED "NO" OR COMMENTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## #15 Grievance File Checklist

### PSAC GRIEVANCE FILE CHECKLIST

GRIEVOR'S NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

Town/City	Province	Postal Code
-----------	----------	-------------

PHONE (w): \_\_\_\_\_ (h): \_\_\_\_\_

APPLICABLE COLLECTIVE AGREEMENT OR BARGAINING UNIT:  
 \_\_\_\_\_

SUBJECT OF GRIEVANCE: \_\_\_\_\_  
 (If insufficient space, please attach appendix)

ATTACHMENTS	YES	NO	N/A
Copy of legible grievance form (retype wording and attach if not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy of legible transmittal form (level 2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy of legible transmittal form (level 3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreement(s) to extend time limits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appropriate referral notice or form (arbitration/adjudication)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Names & addresses of other parties to be advised of arbitration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer's response (level 1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer's response (level 2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer's response (level 3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outline of arguments presented at level 1 grievance hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outline of arguments presented at level 2 grievance hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outline of arguments presented at level 3 grievance hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List of jurisprudence cited at all grievance hearings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completed Steward Factsheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy/summary of any settlement offers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact with grievor (dates and brief summary)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Copy of all pertinent documents in chronological order (attach a list)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appendices (attach a list)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EXPLANATIONS FOR BOXES CHECKED "NO" OR COMMENTS  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

(If insufficient space, please attach appendix)

TIME LIMITS	DEADLINE DATE	DATE PRESENTED	DATE RECEIVED (by employee)
Presentation of grievance			x
Response at Level 1		x	
Transmittal to Level 2			x
Response at Level 2		x	
Transmittal to Level 3			x
Response at Level 3		x	
Referral to arbitration/adjudication			x

NAME OF UNION REPRESENTATIVE (LEVEL 1): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_ FAX: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

NAME OF UNION REPRESENTATIVE (LEVEL 2): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_ FAX: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

NAME OF UNION REPRESENTATIVE (LEVEL 3): \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_ FAX: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

09/2001

## #16 PSAC Grievance Form (also available on the PSAC website)



# Grievance Form Formulaire de griefs

EMPLOYER'S GRIEVANCE NO. / N° DE GRIEF DE L'EMPLOYEUR : \_\_\_\_\_

<b>SECTION 1</b> Comp/Direct Charter Local / Élément/Section locale à charte directe _____ Local / Section locale _____ PSAC ID / N° de membre _____			
Surname / Nom de famille		Given names / Prénoms	Home Tel / Tél. (maison) ( )
Home address / Adresse du domicile		Postal Code / Code postal	Work Tel / Tél. (travail) ( )
Home Email / Courriel personnel		Work Email / Courriel professionnel	
Employee Classification / Classification de l'employé(e)		Branch/Division/Section / Direction/Division/Section	
Position Title / Titre du poste		Work location / Lieu de travail	Shift / Quart de travail
Collective Agreement (if applicable) / Convention collective (s'il y a lieu)			Expiry Date of Collective Agreement Date d'expiration de la convention collective
<b>Grievance details / Énoncé du grief :</b>			
<p style="text-align: right; font-size: small;">(Please attach extra sheets if this space is insufficient / Utiliser d'autres feuilles au besoin.)</p>			
Corrective Action Requested / Mesures correctives demandées			
Employee signature / Signature de l'employée ou de l'employé		Date	
<b>SECTION 2 TO BE COMPLETED BY BARGAINING AGENT REPRESENTATIVE À REMPLIR PAR LE REPRÉSENTANT DE L'AGENT NÉGOCIATEUR</b>			
Signature of bargaining agent representative / Signature du représentant de l'agent négociateur		Date	
Bargaining agent / Agent négociateur		Bargaining unit / Unité de négociation	
Name of local bargaining agent representative / Nom du représentant local de l'agent négociateur		Home Tel / Tél. (maison) ( )	Work Tel / Tél. (travail) ( )
Address for local representative or bargaining agent / Adresse du représentant ou l'agent négociateur		Postal Code / Code postal	Cell No. / N° cellulaire ( )
Home Email / Courriel personnel		Work Email / Courriel professionnel	Fax No. / N° de télécopieur
<b>SECTION 3 TO BE COMPLETED BY IMMEDIATE SUPERVISOR OR OTHER MANAGEMENT REPRESENTATIVE À REMPLIR PAR LE SUPERVISEUR IMMÉDIAT OU UN AUTRE REPRÉSENTANT DE LA DIRECTION</b>			
Name of Management Representative / Nom du représentant de la direction		Title of Management Representative / Titre du représentant de la direction	
Signature of Management Representative / Signature du représentant de la direction		Date received at Level 1 / Date de réception au premier palier	

Once completed and signed by all parties copies to be distributed as follows: one copy to Grievor, one copy to Bargaining Agent Representative, one copy to the Employer Representative  
Une fois que le formulaire est rempli et signé par toutes les parties, en remettre une copie à la partie plaignante, au représentant de l'agent négociateur et au représentant de l'employeur.



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## #17 PSAC Grievance Transmittal Form (also available on the PSAC website)



### Grievance Transmittal Form Formulaire de transmission des griefs

EMPLOYER'S GRIEVANCE NO. / N° DE GRIEF DE L'EMPLOYEUR : \_\_\_\_\_

**SECTION 1**

Level 2 Paller 2	Level 3 Paller 3	Other Levels Autres paliers
------------------	------------------	-----------------------------

**SECTION 2**

TO BE COMPLETED BY EMPLOYEE

A REMPLIR PAR L'EMPLOYÉ (E)

Surname Nom de famille	Given names Prénoms	Telephone No. N° de téléphone
Employer, Department or agency Employeur, ministère ou organisme	Branch/division/section Direction/division/section	Work location Lieu de travail
_____ Employee signature Signature de l'employé(e)		_____ Date

**SECTION 3**

TO BE COMPLETED BY BARGAINING AGENT REPRESENTATIVE

A REMPLIR PAR LE REPRESENTANT DE L'AGENT NÉGOCIATEUR

Approval for presentation of grievance and agreement to represent employee are hereby given Par la présente, j'autorise la présentation du grief et j'accepte de représenter l'employé(e)		
_____ Signature of bargaining agent representative Signature du représentant de l'agent négociateur		_____ Date
Bargaining agent Agent négociateur	Bargaining unit/component Unité de négociation/Élément	
Name of local bargaining agent representative Nom du représentant local de l'agent négociateur	Telephone No. N° de téléphone	Facsimile No. N° de télécopieur
Address for contact Adresse aux fins de communication		E-mail address Adresse électronique

**SECTION 4**

TO BE COMPLETED BY IMMEDIATE SUPERVISOR OR LOCAL OFFICER IN CHARGE

A REMPLIR PAR LE SUPERVISEUR IMMÉDIAT OU LE RESPONSABLE LOCAL

Name and title of management representative Nom et titre du représentant de la direction	Date transmittal received Date de réception de la transmission
_____ Signature	

Once completed and signed by all parties copies to be distributed as follows:: copy to Employee, copy to Bargaining Agent, copy to the Employer/copie au employeur

Une fois que le formulaire est rempli et signé par toutes les parties, en remettre une copie à la partie plaignante, au représentant de l'agent négociateur et au représentant de l'employeur.



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**#18 Case Scenarios – Step 1 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#19 Case Scenarios – Step 2 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#20 Case Scenarios – Step 4 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#21 Case Scenarios – Step 5 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#22 Case Scenarios – Step 7 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#23 Case Scenarios – Step 8 Information**  
**(separate handouts by scenario to be distributed during exercise)**

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**#24 Case Scenarios – Further Information**  
**(Case Outcomes – to be distributed during Day 3 wrap-up)**

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**#25 SPEED PROBLEM-SOLVING SCENARIOS  
PARTICIPANT INFORMATION HANDOUT**

***Distribute this complete package of 8 scenarios as a  
separate handout***

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