

CANADIAN UNIVERSITY EMPLOYEES

( on service contract with the )

CANADIAN UNION OF PUBLIC EMPLOYEES

Office Administration and Membership Servicing Report

January 5th, 1987

Prepared by Doris Hanson  
Job Evaluation Representative

December 1986 and January 1987





CANADIAN UNION OF PUBLIC EMPLOYEES  
SYNDICAT CANADIEN DE LA FONCTION PUBLIQUE

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JOB EVALUATION REPORT - CANADIAN UNIVERSITY EMPLOYEES

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BACKGROUND

In December 1986, Joe Denofreo, CUPE Representative servicing the Canadian University Employees (CUE) requested that I, Doris Hanson Job Evaluation Representative of the Canadian Union of Public Employees, study the office and staff of CUE and make some recommendations to CUE.

A letter of December 8, 1986 followed from CUE with a request for an analysis of the following:

1. Office procedures: are there problems with the way the work is being handled.
2. Staffing level: do we need more staff, or simply a reorganization of the work and procedures of the current staff. Job duties for each position: are the duties properly distributed.
3. Management: do we need a senior position, and if so what should the responsibilities of that position be. Level of clerical assistance: do we need a senior level secretary, a junior level secretary, or both.
4. Pay structure: considering any recommendations on our office structure, what is the appropriate pay structure for this office. Currently the office staff are working many hours more than their regular shifts, and overtime has been a problem issue for years. Is this overtime necessary, and if so how should it be compensated for.

Jeff Rose  
National President  
Président national

Jean-Claude Laniel  
National Secretary-Treasurer  
Secrétaire-trésorier national

Benoit Doyon  
Mike Dumler  
Lucie Nicholson  
Tom O'Leary  
Jack Rodie  
General Vice-Presidents  
Vice-présidents généraux

5. The advantages of hiring versus electing the full-time officers.

This study was requested by Ted Byrne, Union Representative on behalf of the Executive Board and confirmed in writing on December 8, 1986. The Executive Board confirmed the recommendation on December 16, 1986.



The Executive Board took the above recommendations to their December 18th, 1986 meeting but there was no quorum. They did have an informal meeting with the members present and it was agreed that my report would be taken to the membership at the CUE Annual General Meeting in January, 1987.

I met with the Executive Board, Joe Denofreo, CUPE Representative and the full-time staff. The two elected full-time Union Representatives are Ted Byrne and Kitty Byrne. Helen Glavina is the full-time Administrative Secretary, a non-elected position.

Ted Byrne resigned and left CUE on December 31, 1986.

Kitty is the President of CUE and the Temporary Union Representative replacing Patricia House. She will return to her position at UBC in February 1987.

Helen is on a leave of absence from her position at UBC.

Several studies of the staff and office had been conducted in the past but had never been sanctioned by the Executive Board nor were they taken to the membership.

The CUE office was opened in 1974 to provide service, coordination and clerical assistance for the Union's activities and the Union's by-laws reflect this. Until coming to CUPE on a Service Contract, they have not belonged to a National Union.

The Union membership is made up of approximately 1300 part time and full time members in twelve Divisions working in Clerical, Library, Technical and Service Workers positions at the University of British Columbia.

The Union has been on a Service Contract with CUPE since March 1985 and may vote on affiliation to CUPE on March 1, 1987.

#### 1. Office Procedures

There does not appear to be any direction to or coordination between the three full-time positions and the Executive Board.

Each staff person appears to do a total function. In brief, the Union Reps service members, type all their own letters, reports, etc., and do their own filing. The incoming telephone calls are received by the Administrative Secretary who also does the accounting functions on a computer.

The library appears not to be the total responsibility of any one person.



The office is open from 8:30 a.m. to 5:00 p.m., and members can drop in at will. The telephone is answered all day either in person or on an answering machine.

The most notable revelation was that no one is 'in charge' or appears to be responsible for the total CUE office system or for the performances of the Union Representatives or Administrative Secretary.

The staff are on a 9-day fortnight with 7 3/4 hour days. There appears to be a good deal of overtime.

The Executive Board does not appear to be giving direction to staff and some of the elected Executive duties are being done by staff.

### Recommendations

Executive Board meetings should be scheduled to fixed dates and be held twice a month. These dates should only be changed under extraordinary circumstances.

All Executive Board meetings must have minutes so decisions, motions and reports are recorded in writing and followed up at the next meeting. A copy should be sent to absent Executive Board members prior to the next meeting.

The CUPE Constitution should be followed for the Election of Executive Board Officers, duties of Officers and Trustees. See B.II, (B.2.1 to B.2.5), and B III (B.3.1 to B.3.12)

I also recommend that the President be the Chair of the Negotiating Committee.

I would recommend two Vice-Presidents rather than one.

I would also recommend a sergeant-at-arms be elected.

The Trustees should not be on the Executive Board but should be welcome at Executive Board meetings ( See CUPE Constitution B.3.10).

B.3.13 of the Local Union By-Laws should reflect that the hired business agent is under the day-to-day direction of the Executive Board and is responsible to the Executive Board for the Office functions including any need for overtime.

All paid staff should have job descriptions, which along with wages and benefits, should be reviewed prior to the A.G.M. The first V.P. should prepare these recommendations on behalf of the Executive Board for the A.G.M.

Files or file labels should be colour coded by subject and chronologically filed.



The office should not be considered a drop-in centre. Executive Board members and others should have an appointment or regular times/days for their office business.

The telephone answering machine should be used at all times when the office is closed including the lunch hour.

All files should be in the open office area.

The Library should be reviewed with all office documents placed there. All books and data in the library should have a current directory posted. Perhaps all the library material is not necessary if CUE affiliates with CUPE. All outdated data should be disposed of.

A CUPE calendar should be posted in the outer office with meeting dates, appointments and other pertinent information regarding the B.A. and office posted on this calendar.

The Secretary/Receptionist should continue the practice of using separate binders for minutes of all committees, reports and incoming and outgoing correspondence as well as a chronological file kept at the Secretary's desk. These should be cleared every three months and filed.

CUE should arrange a weekend seminar through the CUPE Education Department for a course on Union Administration for the incoming Executive Board.

#### Regular Membership Meetings

The Order of Business (Agenda) in the CUPE Constitution should be followed at all Executive Board--Regular Union Meetings.

#### B.VIII Order of Business

B.8.1 At the opening of the meeting the President shall take the Chair, and shall conduct the business in the following order:

1. Roll call of officers
2. Voting on new members and initiation
3. Reading of the minutes
4. Matters arising
5. Treasurer's Report
6. Communications and bills
7. Executive Committee Report
8. Reports of committees and delegates
9. Nominations, elections, or installations
10. Unfinished business
11. New business
12. Good of the Union
13. Adjournment



Minutes of the previous meeting and the treasurer's report (prepared by the treasurer in conjunction with the bookkeeper) should be copied and distributed to members as they come into the meeting. The sergeant-at-arms should collect contract proposals or other confidential material when the meeting adjourns.

The decisions of the Executive Board should briefly be reported to the members by the first V.P.

~~The Business Agent should report on resolutions of grievances, outstanding grievances, complaints and problems.~~

CUPE and the CLC have many films available for Union meetings; as well, speakers are available for Union meetings from many sources.

This should be on the notice of meetings posted well in advance. As well, all meetings for the total year should be listed in each newsletter.

~~The Secretary/Receptionist (see further on in this report) should report to and be responsible to the Business Agent.~~

The office duties should be restructured as illustrated under the Secretary/Receptionist and Bookkeeper on page 8.

## 2. Staff-Levels and Hiring vs Elected Staff

Two full-time elected Union Representatives service approximately 1300 members.

### a) Representatives

Essentially they both do the same job but one Representative has the major responsibility for grievances, including benefit grievances and appointment notices which require constant surveillance.

The other Representative has the major responsibility for Negotiating, is the Chairperson and Chief spokesperson for the Negotiating Committee and has the prime responsibility for reclassification, grievances and the newsletter.

### Both Representatives

- attend grievance committee meetings
- share the Division responsibilities
- handle or assist with LRB hearings or advice on LRB matters



- assist in training recommendations
- handle or assist UIC and WCB claims
- they shoulder the responsibilities for most committees which do not appear to be functioning well (most notably the Shop Stewards/Grievance Committee)
- Public Relations
- do own typing and filing which takes a total of 30% of their combined time
- other duties

The present salary structure of the Union Representative is inadequate for the expectations of the CUE Executive Board.

#### Recommendations

I recommend that, rather than two elected Union Representatives, CUE have one fully qualified Business Agent based on the CUPE Constitution and pay that person a reasonable salary and benefits based on comparable positions within the Union movement in the Lower Mainland.

This recommendation is reflective of the time both Representatives spend doing clerical duties (combined 30%), attending the same meetings, the redistribution of some of the present duties to the Executive Board members and the availability of advice and assistance from the CUPE National Representative and CUPE National Departments. As well, it does not appear to work having them as members of the Executive Board.

#### Business Agent

B.3.14 Whenever a Business Agent is employed or elected by a Local Union, it shall be at a regular meeting of the Local Union and the duties and conditions of employment of the Business Agent shall be inscribed in the minutes of the meeting. Such duties and conditions of employment shall not be inconsistent with the provisions of this Constitution or the By-Laws of the Local Union. Notwithstanding any other provision of this Constitution, Business Agents, other than from the bargaining unit(s), may have voice but no vote at meetings of the Local Union, and will not be delegates to District Council meetings, Provincial Division and/or National Conventions.

- and is responsible for directing the Union's Secretary/ Receptionist, bookkeeper and the smooth functioning of the CUE Office.



This position should be advertised immediately within the CUE membership and in the Province and Sun. A Personnel Committee should be appointed by the Executive Board to review like union positions in the Lower Mainland to fashion a fair wage and benefit package for all 3 staff, which would reflect the work, hours worked and requirements of the job. This committee will also screen and interview applicants and make recommendations for an appointment as well as wages and benefits.

The duties, skills, qualifications of the Business Agent should be:

1. insure that all Divisions have properly functioning grievance committees
2. assists all Divisions in processing personal and policy grievances
3. assists all committees in exercising their duties in order that all members may receive proper service.
4. prepares and presents briefs to the employer when required or assists the CUPE Public Relations Rep when necessary.
5. assists the CUPE National Representative in all efforts to strengthen the Canadian Union of Public Employees
6. attends Division, Executive Board and Job Steward meetings and makes written reports of same
7. provides advice on the Collective Agreement
8. presents grievances commencing at Step 2 of the Grievance Procedure
9. may, according to a schedule, visit union members on the job sites
10. prepares research material for grievances, WCB appeals, UIC Appeals, arbitrations, LRB hearings, negotiations and represents CUE or assists CUPE Representative in presentations
11. assists committees with Union Newsbulletin for production by clerical staff
12. organizes shop steward seminars and provides advice and assistance to Job Stewards
13. reviews reclassification and re-evaluations and processes grievances if necessary
14. keeps notes at all union/management meetings for files
15. presents some arbitration cases as directed by the Executive Board
16. prepares monthly report on activities for Executive Board and Division meetings
17. assists CUPE Representative in negotiations as directed by Executive Board
18. ability to direct clerical assistants and bookkeeper.

#### B. Working Conditions

Under review.

#### C. Recommended Skills and Experience

1. Experience in negotiations, grievances and arbitrations
2. Experience in WCB, UIC, LRB, reclassification appeals



3. Experience in Labour Management meetings
4. Steward training and experience
5. Local Union Executive Board experience
6. Public speaking ability
7. An understanding of the University environment
8. Have attended a time management course or is willing to attend

The Business Agent may seek advice from the CUPE Representative when required and will work closely with the 2nd V.P. and Stewards. The Stewards will be the first contact for grievors.

The Steward system must be made functional and I recommend that the Division Representatives be deleted from the by-laws and the Shop Stewards become the Division representatives on the Executive Board.

Also delete the Chair of the Grievance Committee from the By-Laws on the Executive Board.

I recommend the Chair of the Grievance Committee be the second Vice-President.

I recommend that two steward training sessions be held each year. One for beginners in February and the other for advanced training in September or October and each of these be scheduled well in advance with the CUPE National Representative and the CUPE B.C. Education Representative.

#### Administrative Secretary

##### Present Duties:

- considerable time xeroxing notices, newsletters and minutes
- does bookkeeping/accounting functions on computer
- answers telephone, directs calls
- opens and directs incoming mail, outgoing mail
- maintains membership files
- solicits volunteers for assistance
- purchases supplies
- other clerical duties
- the incumbent appears to have been hired as a bookkeeper and is now doing a more complicated accounting function on the computer which requires a lot more time and expertise than originally anticipated.

#### Recommendations

The bookkeeping function has become more of a full accounting function on the computer.



I would recommend that the available CUPE accounting software be reviewed through your CUPE National Representative and Marc Belanger from CUPE National Ottawa Office for recommendations and that this function be delegated to a once-a-month part-time bookkeeper. This would free the Administrative Secretary to fulfil a Secretary/Receptionist position, with duties to assist the Business Agent.

I recommend the title be changed to Secretary-Receptionist with the following duties effective date of Business Agent starting.

#### Secretary-Receptionist

Duties performed (under supervision of B.A.)

- acts as an office receptionist
- operates a telephone switchboard
- types letters, reports and minutes from draft copy
- opens and sorts incoming mail
- opens new files, maintains all files, binders in library
- posts outgoing mail
- operates photocopier
- deposits dues and other monies into bank
- orders and receives office supplies and verifies invoices
- books meeting rooms if necessary
- co-ordinates volunteers solicited through the newsletter
- ability to operate computer
- maintains committee and shop steward lists

#### Skills required

Computer experience and demonstrated ability to do the above functions.  
Extensive knowledge of the union movement.

The salary, benefits for this position should be in line with other like positions in other union offices and in conjunction with the collective agreement between UBC and CUE if the position is filled by a member on leave of absence.

If the wages in the study are found to be less than presently paid, the incumbent should be fully red-circled and receive all forthcoming increases until the position is vacated. The position then should be posted internally and advertised in the Sun and Province, using a Personnel Committee for selection and recommendations.

#### Bookkeeper

(Under the supervision of the B.A.)

- salary and benefits under review
- bookkeeping software under review
- part-time 2-3 days a month based on study to be conducted



Duties performed

- prepares payroll for Local Union staff
- posts and balances sub-ledger, cash book and journal
- posts ledgers and trial balances
- prepares monthly financial statements and cheque registry for Executive Board and Union Meetings
- pays Local Union bills
- checks bills from employers for lost time; corrects and pays
- ability to work with the Elected Treasurer.

Skills required

Proven ability to do above duties. Computer experience. Knowledge of the Union movement.

The salary and benefits should be in line with other similar Union positions.

(This need not be done on site at the CUE Office -- depending on the recommendations of the study.)

Management

There appears to be little authoritative management of the Office. Because the elected Union Representatives are part of the Executive Board the decision making process lacks solid recommendations from the 'Staff'.

The Administrative Secretary has no 'direction' or problem solving assistance.

There is little recognition for the job done, or wages commensurate with job duties.

Recommendations

I have made the recommendations previously to help manage the office and staff.

I also recommend a review by the Personnel Committee and the CUPE National Representative to study the wages, benefits and working conditions in other union offices to assist in negotiations with the hired staff.

I also recommend a structure for problem-solving between the Executive and Staff.



Pay Structure

All three staff receive the same pay -- Pay Grade 8 \$1,929.00 a month ( \$12.69 per hour).

Recommendations

The recommendations are on the previous pages:

- ie Pay should reflect job duties and based on similar union positions within union offices in the Lower Mainland

Elected vs Hired Staff

This only applies to the full time Union Representatives. The Administrative Secretary is a hired staff position.

Recommendations

Are on the previous pages, but I again reiterate that all staff should be hired and that CUE have:

1. One Business Agent (full time)
2. One Secretary-Receptionist (full time)
3. Bookkeeper 2-3 days a month, whichever is required, and that the new accounting package now being used be compared to the newly available CUPE software package for the least complicated and most efficient operation.

ADDITIONAL OBSERVATIONS

Education Recommendation

- Shop Steward education on previous pages
- Executive Board education is recommended through the CUPE Education Department for a weekend seminar
- Tech change in the Union office should be addressed in a Collective Agreement or contract with hired staff.
- All elected positions should be allowed and encouraged to attend CUPE Education Courses for their positions and any interest in Union commitment by members should be encouraged.



### Committees

It is essential for an effective local to have active committees.

Advice from your CUPE Representative is available if required to have effective local participation by members.

### Budget

CUE, through your National Representative, invited the CUPE National Accounting Department to assist with a budget. (Appendix A).

I think all my recommendations can be comfortably realized with some adjustments to that budget.

### CONCLUSION

First of all I would like to thank your Executive Board, Staff and CUPE Representative for all the assistance and information willingly given to solve the problems of your office.

I realize that these are fairly ambitious recommendations but with both elected Union Representatives leaving, it is the optimum time to make changes and a review of the total CUE office is long overdue. It is very healthy to continually review procedures.

I also realize the limitations on time that local Executive Board members face when reviewing such facilities.

All my recommendations are made with a view to your affiliation to the Canadian Union of Public Employees and will all of CUPE's expertise available to you through the following departments:

- Legal and Legislative Department
- Department of Organizing and Servicing
- Education Department
- Research Department
- Job Evaluation Department
- Equal Opportunities Office
- Health & Safety Department
- Public Relations Department

Keeping in mind that Rome wasn't built in a day, and the result of the race between the tortoise and the hare - any changes should be slowly and carefully carried out and where necessary, never be hesitant in asking for help from experts!



Highlights of the Review in brief

I have recommended that the two full-time elected Union Representatives be replaced by one qualified full-time hired Business Agent. This position would be responsible for the functioning of the office and the other hired staff. I also recommend extensive office procedure changes.

I have recommended that the title of Administrative Secretary be changed to Secretary-Receptionist and the emphasis of this position changed to assist the Business Agent with the appropriate clerical duties as well as receptionist duties.

I have recommended that the complicated accounting function be reviewed and a fully qualified bookkeeper be hired to do the bookkeeping and payroll functions decided upon. This should take no more than 2-3 days a month.

I have recommended that the Business Agent be responsible to the Executive Board.

I have recommended that the Executive Board be restructured as indicated and the President automatically becomes the Chair of the Negotiating Committee. The first Vice President would be responsible for reporting Executive Board functions to the members as well as the Report on staff wages and benefits to the A.G.M. The second Vice-President would be the Chair of the Grievance Committee and responsible for the functioning of the Stewards.

I have recommended that the Division Representatives be dropped from the Executive Board and replaced by the Shop Stewards who will have two training sessions each and every year.

The trustees should not be members of the Executive Board as indicated in the CUPE Constitution.

I have recommended that a Sergeant-at-arms be elected and be part of the Executive Board and responsible for Union meeting security and sign-in duties.

I have recommended that a Personnel Committee be struck to hire staff and review the salary and benefits for all hired staff based on similar union positions in the Lower Mainland.

I have made Education and Committee recommendations.

I have reviewed the two prepared budgets and recommend the use of the budget which shows CUPE affiliation. This budget closely scrutinized should fit my recommendations with a few adjustments.



If this report is accepted by the membership, a Special By-Law Committee should be struck to amend the existing By-Laws for membership approval.

The Author

- held every elected office in her Local Union except Treasurer from 1970 - 1978 and ran an elementary school office for 8 years
- was Area Rep, Secretary and first Vice-President of CUPE B.C. Division from 1976 - 1978
- came on staff as a CUPE Servicing Representative in 1978
- administered two local unions which included doing all the Secretary-Treasurer's functions
- was appointed Job Evaluation Representative in 1986
- prior to 1970 was an Executive Secretary in Private Industry, which included running two offices.



# APPENDIX A

## CANADIAN UNIVERSITY EMPLOYEES BUDGETED STATEMENT OF REVENUE AND EXPENSES FOR 1987

REVENUE:	ACCOUNT #	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	TOTAL
Dues and Init. Fees	3000	24100	24100	24100	24100	24100	24100	24100	30400	24100	24100	24100	24100	295500
Interest	3100	75	75	75	75	75	75	75	75	75	75	75	75	900
Donations	3200	0	0	0	0	0	0	0	0	0	0	0	0	0
CUPE Salary Grant	3300	3000	3000	3000	3000	3000	3000	3000	3000	3000	3000	3000	3000	36000
Total Revenue	27175	27175	27175	27175	27175	27175	27175	27175	33475	27175	27175	27175	27175	332400

### EXPENDITURES

Arbitration Expense	4000	420	420	420	420	420	420	420	420	420	420	420	420	5040
Contrib. Strike Fund	4010	0	0	0	0	0	0	0	6300	0	0	0	0	6300
Courses & Conf.	4020	360	360	360	360	360	360	360	360	360	360	360	360	12220
Depreciation Exp.	4030	169	169	169	169	169	169	169	169	169	169	169	169	2028
Donations	4040	50	50	50	50	50	50	50	50	50	50	50	50	600
Subscriptions	4050	208	208	208	208	208	208	208	208	208	208	208	208	2496
Empl. Ben./UIC-CPP	4060	270	270	270	270	270	270	270	270	270	270	270	270	3240
Empl. Ben./Medical	4070	661	661	661	661	661	661	661	661	661	661	661	661	7932
Equipment Lease	4080	206	206	206	206	206	206	206	206	206	206	206	206	2472
Exec./Committee Exp.	4090	333	333	333	333	333	333	333	333	333	333	333	333	3996
General Expenses	4100	50	50	50	50	50	50	50	50	50	50	50	50	600
Insurance	4110	60	60	60	60	60	60	60	60	60	60	60	60	720
Int. & Service Chg.	4120	12	12	12	12	12	12	12	12	12	12	12	12	144
Legal/Account'g Fees	4130	430	430	430	430	430	430	430	430	430	430	430	430	5160
Med. Benefit/Memb.	4135	480	480	480	480	480	480	480	480	480	480	480	480	5760
Newsletter	4140	100	100	100	100	100	100	100	100	100	100	100	100	1200
Office Supplies	4145	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	12600
Per Capita/Other *	4150	13300	13300	13300	13300	13300	13300	13300	13300	13300	13300	13300	13300	159600
Postage/Courier	4160	636	636	636	636	636	636	636	636	636	636	636	636	7632
Printing	4180	50	50	50	50	50	50	50	50	50	50	50	50	600
Prof. & Consulting	4185	220	220	220	220	220	220	220	220	220	220	220	220	2640
Rent & Taxes	4190	100	100	100	100	100	100	100	100	100	100	100	100	1200
Repairs/Maint.	4200	405	405	405	405	405	405	405	405	405	405	405	405	4860
Salaries/Off. Staff	4210	130	130	130	130	130	130	130	130	130	130	130	130	1560
Taxis/Parking	4220	7989	6060	6060	6060	6060	6060	6060	6060	6060	6060	6060	6060	74649
Telephone	4225	120	120	120	120	120	120	120	120	120	120	120	120	1440
Utilities	4230	220	220	220	220	220	220	220	220	220	220	220	220	2640
	4240	70	70	70	70	70	70	70	70	70	70	70	70	840

### TOTAL EXPENSES:

SURPLUS/(DEFICIT)

28099	26170	26170	26170	26365	26365	28865	32665	26365	31765	26365	26365	331729
-924	1005	1005	1005	810	810	-1690	810	810	-4590	810	810	671

\* Based on B.C. Fed. per capita dues.  
If we join B.C. Div. of C.U.P.E. and  
Vancouver and District Labour Council  
we would spend \$2300 extra.