



# Guide to Leadership Accountabilities and Competencies

For Leaders at the Bargaining Unit and Local level

**June 2025**

This Guide helps leaders understand how the accountabilities for their positions contribute to ONA's strategic priorities and offers resources and opportunities to build competencies for their positions.

# Table of Contents

- Introduction to the Guide ..... 3
- Bargaining Unit President..... 5
- Negotiations Committee ..... 12
- Grievance Chair..... 19
- Labour-Management Committee ..... 26
- Unit Representative..... 33
- Health and Safety Representative..... 39
- Safe Return to Work/Accommodation Representative ..... 46
- Human Rights and Equity Representative ..... 52
- Professional Responsibility and Workload Representative..... 57
- Professional Development Committee Representative..... 64
- Political Action Representative..... 70
- Site Representative (Site Rep) ..... 75
- Introduction to the Local Executive..... 77
- Local Coordinator ..... 80
- First Vice-Coordinator..... 87
- Treasurer..... 94
- Secretary..... 101
- Resources To Support ONA Leaders ..... 107
- Acronyms Commonly Used at ONA ..... 109

## Introduction to the Guide

The work of the Bargaining Unit and Local executive leadership is integral to providing service to our members. This document outlines leadership accountabilities and competencies for each role and is intended as a resource to assist and support leaders in their work and meet their accountabilities. The majority of the leadership roles identified in this document are found within ONA's constitution; elections to all of the positions are conducted in accordance with the ONA constitution and policies.

The leadership accountabilities help ensure progress is made on ONA's mission, vision and values and ONA's six strategic priorities:

- Members Informed: Empowering you with the information you value
- Members Included: Supporting you to achieve better work conditions
- Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you
- Telling Ontarians the Truth: Sharing what you know about the state of the health care system
- Everyone Included: Creating a more diverse, equitable, and inclusive union
- Our Work, For You: Excellence for you, from ONA's Board and Staff

The accountabilities for each leadership position are organized under the relevant strategic priority that the accountabilities are intended to advance. It is important to link leadership accountabilities to ONA's strategic outcomes so that new and existing leaders can understand the 'why' underlying their accountabilities. It also helps members see how individual leadership roles within Bargaining Units and Locals work together to meet broader ONA's strategic outcomes.

The competencies for each leadership role are also included as well as opportunities for leaders to build them. Opportunities include workshops, eLearning, provincial meetings, and more. At the end of this document there is a section on ONA's growing body of resources created specifically to support leaders at both the Bargaining Unit and Local levels, including ONA guides, checklists, and references.

Board members and ONA staff play an important role in providing support, coaching and mentoring for leaders and members in understanding the leadership competencies and accountabilities required to fulfill each role, as well as how to grow in these positions.

It is recognized that there will be differences between multi-unit Bargaining Units and single Bargaining Units, and between Bargaining Units of different sizes. Discussion should therefore be held at each Local/Bargaining Unit as to how the document can be best used to support the work of its leaders and determine

whether further delineation of role accountabilities and activities is required for leaders to fulfil their roles.

## **Bargaining Unit President**

The Bargaining Unit President plays a pivotal role in the Bargaining Unit and is the link between the Local and the Local executive team. The Bargaining Unit President articulates the contract administration service needs of the Bargaining Unit to the Local executive and works in collaboration with the Local executive team to ensure that the Bargaining Unit has sufficient resources to support labour relations at the Bargaining Unit level. The Bargaining Unit President identifies their education needs so that they can develop skills to perform in their role. Bargaining Unit Presidents' rights are protected as they function as a union leader, ensuring that their members' rights are protected, and the Collective Agreement is upheld. The Bargaining Unit President works collaboratively with the Bargaining Unit leadership team, the Local executive and the Labour Relations Officer.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Attend Bargaining Unit meetings
- Ensure member information is kept confidential, including their personal health information, including:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the Bargaining Unit President e-mail account only for bargaining unit work (i.e. not using Employer e-mail)
- Attend ONA meetings (e.g. Provincial Leadership Meeting, Biennial Convention, etc.)
- Monitor the financial situation of the Local and ensure that monies are spent effectively, appropriately and within the scope of the Local and provincial policies.
- Build effective working relationships with the members of the Local executive and/or Bargaining Unit Team, employer, Labour Relations Officer(s) and members.
- Turn over all files to incoming Bargaining Unit President in accordance with ONA Policy 8.2 *Records Retention and Exchange of Information*.

### **Priority: Members Informed: Empowering you with the information you value**

- Post relevant information on the ONA bulletin board at all sites, including:
  - Meeting notices

- Calls for nominations and other election notices
- Names and contact information of Bargaining Unit leadership
- Information from the Board of Directors and the Local executive
- Activities of the union (political action campaigns, central bargaining processes where applicable, Nursing Week events, etc.)
- Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement and ONA resources (i.e. guides, workshops, tip sheets, etc.)
- Ensure there is a process in place for orientation of new members regarding services the union provides and send membership cards to the ONA provincial office
- Know how to access the ONA membership policy manual and how to contact their Regional Vice-President for support on governance issues
- Ensure a representative is appointed to be knowledgeable in the health and welfare benefits offered by ONA as per the constitution
- Follow the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Educate members on their collective agreement rights, grievance process and workload reporting process
- Follow the process in their Bargaining Unit to update the executive booklet (i.e. ensure names and personal email addresses are updated so communications can be received from ONA)

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Ensure members' rights are protected and the collective agreement is enforced by:
  - Providing the membership access to the current collective agreement
  - Monitoring employer practices and policies and notifying the Labour Relations Officer of any changes
  - Meeting regularly with the Labour Relations Officer and discussing all potential violations of the collective agreement and/or legislation
  - Following the Labour Relations Officer's advice and providing the relevant and requested documentation
  - Informing members on the status of their issue in a timely manner and communicating what members can expect around service delivery in accordance with service delivery accountabilities
  - Establishing dates for the year, in collaboration with the employer, for regular grievance and labour-management meetings
- Serve as the chair of Bargaining Unit committees, as outlined in the ONA constitution, including:
  - Co-chair of the labour-management meeting, regularly canvassing the membership for issues and bringing them forward

- Chair of the union negotiating committee
- Ex-officio member of all other committees within the Bargaining Unit, ensuring they are functioning effectively
- Know where to access information/resources to support labour relations work at the Bargaining Unit level, such as:
  - Service delivery accountabilities for all of ONA's services.
  - ONA membership resource manuals, guides and learning opportunities.

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - ONA (i.e. Relevant service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Collective agreement, administration and enforcement, including payment/salary reimbursement for meetings and arranging for time off during working hours to attend meetings
  - Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act), and regulatory bodies' standards
  - Employer policies
- Support the development of Bargaining Unit leaders by:
  - Acting as a coach and mentor to the Bargaining Unit leadership team
  - Coaching and mentoring Bargaining Unit leaders in their roles
  - Ensuring the Bargaining Unit leadership team has access to ONA resources to support their work
  - Identifying Bargaining Unit educational needs to support labour relations services and assist members in the registration process for approved education
  - Informing the Local executive team, in preparation for the development of the Local budget, of the Bargaining Unit's learning needs
- Support the work of the Bargaining Unit Leadership team by:
  - Liaising with committee chairs and ensuring there are processes at the Bargaining Unit level to track issues (grievances, health and safety issues, professional practice issues, labour-management issues, human rights, and equity issues, etc.), capturing minutes of these meetings
  - Collaborating with the Bargaining Unit leadership team, identifying potential new leaders and mentors for succession planning

- Ensuring committees are elected (where possible to share the workload) as per the ONA constitution, ONA election policies and collective agreement
  - Attending the annual Local meeting for budget approval by the membership
- Work collaboratively with the Local executive team to ensure the Bargaining Unit is supported by:
  - Developing a budget collaboratively with the Local executive for the coming year that will support the labour relations needs of all bargaining units within the Local
  - Providing information for budget planning, such as the learning needs of the Bargaining Unit, status of bargaining and outstanding grievances/arbitrations for the coming year
  - Meeting with the Local Coordinator regularly and liaising with the Provincial Vice-Presidents, President, and First Vice-President
  - Ensuring that the Treasurer has a current copy of the Bargaining Unit collective agreement
  - Reviewing the monthly dues remittance report (DRR) for accuracy and the Local policies annually
- Ensure that there is a process in place to turn over files to an incoming Bargaining Unit President

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Create and maintain a means of communicating with members (e.g. newsletter, website, social media, bargaining unit meetings, etc.) about ONA's work provincially (e.g. actions, bargaining, etc.)
- Support and attend Local and Bargaining Unit political action activities
- Ensure visibility of Local's brand
- Communicate grievance trends to the Local Coordinator via e-scan, so that Local/regional/provincial trends can be detected and communicated

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Deliver, or delegate, the land acknowledgement at the start of every Bargaining Unit membership meeting
- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promote ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and ONA’s statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial policies</li> <li>• Local policies and Local finance</li> <li>• ONA health and welfare benefits</li> </ul>	<ul style="list-style-type: none"> <li>• New Bargaining Unit President Workshop</li> <li>• Unionism 101 – The History, the Impact, The Power</li> <li>• Rocking Your Role as a Bargaining Unit President</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration and enforcement</li> <li>• Legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA), Ontario Human Rights Code, Ontario Labour Relations Act)</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> <li>• Relevant service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Preparing Your Team for Negotiations</li> <li>• Making it Count at Investigations and Disciplinary Meetings</li> <li>• Making it Count at Labour-Management Meetings</li> <li>• Sector specific Contract interpretation workshops (i.e. Homes Central Contract Interpretation or Hospital Central Contract Interpretation)</li> <li>• Right to Strike (applicable to Right to Strike bargaining units)</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Support and model ONA’s mission, vision and values at the Local and Bargaining Unit levels</li> <li>• Maintain confidentiality and privacy of membership information</li> <li>• Act in alignment with ONA’s values</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• Facing Professional Practice Concerns</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Visionary</b></p> <ul style="list-style-type: none"> <li>• Communicate the ‘big” picture to members</li> <li>• Think strategically, problem-solve and move Bargaining Unit activities forward</li> </ul>	<ul style="list-style-type: none"> <li>• Provincial Leadership Meetings</li> <li>• Leadership summit</li> <li>• Area Coordinators Conference</li> <li>• Provincial Coordinator Meetings</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership and quality patient care</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> </ul>

<b>Competencies and Accountabilities</b>	<b>Competency/Skill Development Opportunities</b>
<ul style="list-style-type: none"> <li>• Advocate for membership needs at the Local executive (e.g., education, budget needs, Servicing supports)</li> <li>• Support and attend Local activities (rallies, picket lines, etc.)</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Grievance Process</li> <li>• Advocacy, Proficiency and Professionalism</li> <li>• H&amp;S: What you need to know</li> <li>• JHSC Toolkit Workshop</li> <li>• Basic Introduction to Human Rights</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to help others grow and succeed</li> <li>• Liaise with other members of the Bargaining Unit Leadership Team and support them in their roles</li> <li>• Develop a succession plan for the Bargaining Unit Leadership Team</li> <li>• Support members’ access ONA resources (i.e. guides, workshops, tip sheets, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<ul style="list-style-type: none"> <li>• Create a communication plan to gather information/labour relations issues from membership</li> <li>• Disseminate information from ONA at the provincial level/Local level to the membership (e.g., newsletters, e-mail blasts, union meetings), and vice versa, fostering 2-way communication</li> <li>• Foster awareness of who the BU leaders are and their contact information is readily available.</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process</li> <li>• Resolving Conflict</li> <li>• Conducting Effective Meetings</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti- Oppression</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build effective relationships with both the Bargaining Unit leadership team and Bargaining Unit members (e.g., ensure that union orientation occurs, members are aware of how to contact their Bargaining Unit President/Union Representative, meetings dates are posted, etc.)</li> <li>• Build an effective relationship with the Labour Relations Officer</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Keep track of key provincial and Local calendar dates</li> <li>• Plan and schedule membership meetings, labour-management meetings, grievance meetings, and meetings with members on labour relations issues</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and secure all labour relations files</li> <li>• Maintain and update the MIRE</li> <li>• Review and identify gaps in the DRR and notify the Local Treasurer</li> <li>• Maintain a record of personal membership contact information</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> <li>• Introduction to Technology for New Bargaining Unit Presidents</li> </ul>

## **Negotiations Committee**

Negotiations are a key priority and legal obligation for the union. The purpose of the Negotiating Committee is to negotiate a collective agreement that reflects ONA's mission. The negotiations process is the first step in representing members. Ensuring the collective agreement is upheld is the second step.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Attend Bargaining Unit meetings
- Maintain confidentiality throughout the bargaining process in accordance with ONA privacy policy
- Maintain and secure bargaining information by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only), including the original proposals (ONA and employer), items in agreement, final signed memorandum and copies of individual team members' bargaining notes for each day of bargaining
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA sponsored e-mail accounts only, where available, for bargaining unit work (i.e. not using Employer e-mail)
- Adhere to Local policy, including financial policies and any paid time for the negotiations process that is not covered by the Employer. Teams must be aware of Local financial policies and the budget so that they can be fiscally responsible. This requires ongoing liaison between the Bargaining Unit President and the Local Coordinator.
- Build effective working relationships with the members of the Negotiations Committee, Local executive and/or Bargaining Unit team, employer, Labour Relations Officer(s) and members
- Ensure and participate in a process to turn over files to an incoming negotiations committee chair and/or committee members

### **Priority: Members Informed: Empowering you with the information you value**

- Keep members informed of bargaining by:
  - Providing ongoing communications to the membership regarding the bargaining process and its status, including timelines and bargaining

dates (e.g., via Bargaining Unit meetings, newsletters, bulletin boards, emails etc.). These communications are issued by the committee chair.

- Fostering awareness of who the bargaining unit leaders are and where their contact information is readily available
- Fostering a sense of advocacy by encouraging members to familiarize themselves with the collective agreement and bargaining process
- Raising awareness with the membership of key provincial and Local calendar bargaining-related dates
- Following the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Following the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal email addresses are updated so that communications can be received from ONA)

### **Priority: Members Supported: Supporting you to achieve better work conditions**

- Consult with members to gather information on problem areas of the collective agreement
- Build an effective relationship with members of the Negotiating Committee
- Promote demand setting meetings where applicable and encourage member attendance
- Promote awareness of information/resources to support bargaining at the Bargaining Unit level, including ONA membership resource manuals, guides and learning opportunities.

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - ONA (i.e. ONA constitution and ONA statement of beliefs, relevant service delivery accountabilities including negotiations, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act), and regulatory bodies' standards
  - Employer policies
  - Collective agreement, administration and enforcement, including:
    - Payment/salary reimbursement for meetings under the collective agreement and arranging for time off during working hours to attend meetings
    - Payment for time spent in meetings with the Employer as per the Collective Agreement (The team needs to be strategic in

- planning to ensure that the majority of hours spent bargaining with the employer is on employer-paid time)
    - Understanding of provincial vs Local issues, where applicable
    - Knowledge of bargaining history at the Bargaining Unit level
- Advocate for quality patient care through improvements to professional responsibility language in the collective agreement
- Plan and schedule bargaining dates in collaboration with the Team, Labour Relations Officer and employer
- Invest in the ongoing orientation and development of Negotiations Team members by:
  - Mentoring new team members
  - Identifying educational opportunities to help new team members in their role, such as a modified negotiations workshop (subject to financial approval by the Local executive)
  - Ensuring the team has clear expectations about the process, including proposal development and how consensus will be reached on issues
  - Advocating for committee member participation in the process which may include education
  - Learning about and understanding their role in the bargaining process after proposal development (e.g., scribe verbatim comments made by the employer on each proposal, provide background material to support ONA's positions and to assist in responding to the employer, review and understand the impact of withdrawing or amending proposals, sign off on agreed-to items, the importance of caucus meetings pre and post bargaining sessions with the employer and signing and supporting the final memorandum of agreement)
  - **Note:** team members must provide the Labour Relations Officer with a copy of their bargaining notes at the end of each bargaining date
- Prepare for bargaining by:
  - Implementing a process for membership to provide input into proposal development (e.g., membership surveys/questionnaires) and actively soliciting feedback from Unit Representatives, grievance chair, Health & Safety Representative, return to work/accommodation representative, and the Bargaining Unit membership (e.g. via meetings etc.).
  - Reviewing labour-management meeting minutes, professional development committee minutes, arbitrations awards, ONA direction, and provincial trends
  - Planning and scheduling preparatory meetings in collaboration with the Labour Relations Officer and team members for review and vetting of proposals, bargaining preparation (including conciliation, interest arbitration and hearing dates), and/or strike mandate meetings and strike meetings (in the right-to-strike sector). Local

Coordinator and the Regional Vice-President attendance should be considered when scheduling strike mandate and strike meetings with the membership.

- Ongoing liaising with the Labour Relations Officer and the committee during all stages of bargaining
- Strive to provide excellent representation by:
  - Advocating for collective agreement improvements that are consistent with member priorities and reflective of concerns raised by all categories of members (i.e., full-time, part-time, NP, RN, RPN, Health Care Professionals, etc.)
  - Monitoring timelines and proactively addressing any delays by the employer
  - Planning and scheduling ratification meetings in collaboration with the Labour Relations Officer and Regional Vice-President (as required)
  - Ensuring there is ongoing communication with the Local Coordinator and Treasurer on the status of bargaining
  - Building an effective relationship with the Labour Relations Officer
- Liaise with other members of the Bargaining Unit leadership team and support them in their roles
- Provide the Bargaining Unit President with any personal membership contact information for records retention

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Apply a Human Rights & Equity (HRE) lens when preparing bargaining proposals, consulting with their HRE Representative for input on proposal development
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO Action Plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and ONA’s statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial policies</li> <li>• Local policies and Local finance, including those related to bargaining</li> <li>• ONA health and welfare benefits</li> <li>• service delivery accountabilities, including negotiations</li> <li>• Knowledge of bargaining history at the Bargaining Unit level</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration and enforcement, including an understanding of Provincial vs. Local issues where applicable</li> <li>• Legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA), Ontario Human Rights Code, Ontario Labour Relations Act)</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> <li>• Relevant service delivery guides</li> </ul>	<ul style="list-style-type: none"> <li>• Preparing Your Team for Negotiations</li> <li>• Hospital/Homes Central Contract Interpretation Workshop</li> <li>• Right to Strike</li> <li>• eLearning: Negotiation Series</li> <li>• Conducting Effective Meetings</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality during the bargaining process</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement and bargaining process</li> <li>• Advocate for timely bargaining</li> <li>• Advocate for quality patient care through improvements to professional responsibility language in the collective agreement</li> <li>• Advocate for collective agreement improvements that are consistent with member priorities and reflective of concerns raised by all categories of members (i.e., full-time, part-time, NP, RN, RPN, Health-care Professionals etc.)</li> <li>• Advocate for committee member participation in the process</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• Stronger Bargaining Units: Through Intergenerational Solidarity</li> <li>• Advocacy in Action 101</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Mentor new team members</li> <li>• Identify educational opportunities to help new team members in their role</li> <li>• Liaise with other members of the Bargaining Unit Leadership team (i.e., Unit Representatives) and support them in their roles</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Consult with members to gather information on problem areas of the collective agreement</li> <li>• Respond to member issues in a thoughtful and timely manner</li> <li>• Ongoing liaising with the Labour Relations Officer and the committee during all stages of bargaining by the Committee Chair</li> <li>• Ongoing communication with the members on the status of bargaining by the Committee Chair</li> <li>• Provide high level scan report back on trends in the Bargaining Unit at membership meetings, ensuring confidentiality is maintained</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build an effective relationship with members of the negotiating committee, Bargaining Unit leadership team, members and Labour Relations Officer</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key provincial (where applicable) and Local calendar bargaining related dates</li> <li>• Participate in demand setting meetings where relevant</li> <li>• Plan and schedule bargaining dates in collaboration with team members, Labour Relations Officer and employer</li> <li>• Plan and schedule preparatory meetings in collaboration with the Labour Relations Officer and team members</li> <li>• Plan and schedule ratification meetings in collaboration with the Labour Relations Officer, Regional Vice-President (as required)</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and secure all bargaining files</li> <li>• Provide the Bargaining Unit President with any personal membership contact information for records retention</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> </ul>

## **Grievance Chair**

Contract administration is the management of violations of the collective agreement, including filing and processing grievances, and is a key priority and legal obligation for the union. Filing grievances where there are violations of the collective agreement is how we enforce the agreement. The grievance process demonstrates the union's commitment to members, reflecting its vision. The grievance process is a collaborative supportive process involving members, union representatives and ONA staff.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promotes ONA's strategic plan
- Attend Bargaining Unit meetings
- Be aware of yearly meetings, meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Conventions, etc.), attending where required
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)
- Build effective working relationships with the members of the Bargaining Unit team, employer, Labour Relation Officer(s) and members
- Ensure and participate in the process to turn over files to an incoming grievance chair

### **Priority: Members Informed: Empowering you with the information you value**

- Follow the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Educate members on their collective agreement rights and the grievance process
- Follow the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)

- Foster awareness among the membership about:
  - Who their bargaining unit leaders are and how to contact them
  - How to access the current collective agreement, either hard copy or an electronic version and available ONA resources (e.g. eLearning, workshops, etc.)
- Foster a sense of advocacy by encouraging the membership to:
  - Familiarize themselves with the collective agreement, in particular articles related to the grievance procedure, return to work, human rights, etc.
  - Contact the grievance chair with contract administration issues in a timely way to ensure grievance timelines are met
  - Familiarize themselves with available ONA resources
- Foster awareness among potential grievors about:
  - The status of the grievance process in a job posting grievance (Please refer to ONA Policy 14.3 *Assistance of Staff in Processing of Job Posting Grievances*)
  - The grievance arbitration process, their rights under the collective agreement and what to expect as the process unfolds, including any delays once the grievance is referred to arbitration
- Ensure that the grievor(s), Bargaining Unit President, Unit Representative and the Labour Relations Officer are kept up to date of the status of the grievance(s) and/or arbitration dates
- Provide ongoing interpretation of the collective agreement so that members know whether they have a grievance

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Strive to ensure for excellent representation for members by:
  - Representing and supporting members throughout all stages of the grievance procedure in accordance with the collective agreement, Labour Relations Act and the Ontario Human Rights Code, and representing and/or supporting members through non-disciplinary meetings as designated by the Bargaining Unit President
  - Engaging in ongoing discussions with Labour Relations Officer and Bargaining Unit President regarding potential disputes
  - Filing grievances as needed, consulting with the Labour Relations Officer on wording, advice and the nature of grievance and distributing grievance form copies as per the process (member, Bargaining Unit President, Labour Relations Officer, employer)
  - Adhering to the grievance procedure timeline(s) in the collective agreement

- Ensuring a process is in place for the timely collection of grievance data by interviewing the potential grievor, utilizing the grievance fact sheet and/or relevant questionnaires and providing this information in a timely manner to the Labour Relations Officer
- Planning and scheduling prep meetings with the grievor(s) and Labour Relations Officer; step 2 grievance meetings and arbitration prep meetings with members, Labour Relations Officer and litigating Labour Relations Officer as needed
- Extending time limits where appropriate, in consultation with the Labour Relations Officer
- Where feasible, plan and schedule grievance meetings, in collaboration with the employer, for the year
- Advocate for membership and a quality practice environment and quality safe patient care
- Ensure a process is in place to identify trends and report problem areas of the collective agreement to the Bargaining Unit President and negotiating committee for proposal development in bargaining
- Develop and maintain a process to track and ensure disciplines are removed from a member file in accordance with the collective agreement
- File Management
  - Ensure all grievance files (including a copy of the original grievance form and fact sheet) are maintained at the Bargaining Unit level, in accordance with ONA policy
  - Maintain an ongoing list of grievances/status including timelines (e-scan report back to Bargaining Unit President)
  - Maintain a record of concerns identified with employer policies (including attendance management) and procedures for potential grievances
  - Ensure detailed records/notes of any/all discussions with grievor regarding the potential disputes/ actual disputes are maintained

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - ONA (i.e. Relevant service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Collective agreement, administration and enforcement, including payment/salary reimbursement for meetings under the collective agreement, and arranging for time off during working hours to attend meetings

- Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act), and regulatory bodies' standards.
- Employer policies
- Inform the Local budgeting process by identifying and discussing any potential and known financial impacts to the Bargaining Unit President, including any grievances, mediations and/or arbitrations scheduled
- Help ensure consideration of other avenues, committees and alternatives to resolve/discuss issues in addition to, or instead of, the grievance process, especially in instances where there is no violation of the collective agreement
- Ensure the grievance committee is aware of the dispute resolution mechanism under ONA policy 14.1 for resolution of disputes regarding the filing of grievances and/or advancement through the grievance arbitration process
- Identify ONA workshops that would be beneficial to committee members and incorporate into learning needs assessment for Local executive
- Communicate in a clear and effective way with the Bargaining Unit President, grievor and Labour Relations Officer, and liaise with other members of the Bargaining Unit leadership team (i.e., Unit Representatives)
- Review employer policies such as attendance management and return to work/accommodation policies annually, at a minimum
- Communicate grievance trends to the Bargaining Unit President via e-scan, so that Local/regional/provincial trends can be detected and communicated

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Ensure visibility of Local's brand

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a Human Rights and Equity (HRE) lens applied to them, track human rights issues and/or liaise with the HRE Representative, and discuss strategies for resolution and/or recommendations for bargaining
- Maintain records of HRE issues
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and ONA’s statement of beliefs</li> <li>• ONA’s strategic plan benefits</li> <li>• ONA provincial policies</li> <li>• Local policies and finance, including those related to the grievance/arbitration process</li> <li>• ONA health and welfare benefits</li> <li>• Service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> <li>• Basic Introduction to Human Rights</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration, and enforcement</li> <li>• Legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA), Ontario Human Rights Code, Ontario Labour Relations Act)</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> <li>• Relevant service delivery guides</li> </ul>	<ul style="list-style-type: none"> <li>• New Grievance Chairs Workshop</li> <li>• Grievance Process</li> <li>• Return to Work and Accommodation</li> <li>• Return to Work and Accommodation: Representing Members with Mental Health Illnesses or Injuries</li> <li>• JHSC Toolkit</li> <li>• Harassment, Mobbing and Bullying</li> <li>• Violence: Be Savvy and Safe</li> <li>• Grievance Arbitration</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• LEAP: CNO Complaints and Reports</li> <li>• It's More Than Social Media</li> <li>• LEAP: CNO Health Inquiries and the Nurses’ Health Program</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement</li> <li>• Ensure that timelines of issues are met and adhered to as outlined in the collective agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Making it Count at Investigations and Disciplinary Meetings</li> <li>• Making it Count at Return to Work and Accommodation Meetings</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Liaise with other members of the Bargaining Unit leadership team (i.e., Unit Representatives)</li> <li>• Mentor members on the grievance arbitration process</li> <li>• Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• Resolving Conflict</li> <li>• Conducting Effective Meetings</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Ensure a process is in place for members to know who and how to contact member(s) of the grievance committee</li> <li>• Foster awareness of who the Bargaining Unit leaders are and their contact information</li> <li>• Communicate with Labour Relations Officer for advice and grievance wording or strategies for resolution</li> <li>• Ensure continued feedback/connection with grievor throughout the process</li> <li>• Ensure an effective communication process is established in the Bargaining Unit with the grievor, Grievance Committee, Bargaining Unit President and Labour Relations Officer</li> <li>• Provide high-level e-scan report back on trends in the Bargaining Unit at membership meetings, ensuring confidentiality is maintained</li> </ul>	<ul style="list-style-type: none"> <li>• Sector specific Contract interpretation workshops (i.e. Homes Central Contract Interpretation or Hospital Central Contract Interpretation)</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• LEAP: Investigations Beyond the CNO</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build an effective relationship with Bargaining Unit members</li> <li>• Build an effective relationship with Labour Relations Officer, grievance committee and others as needed</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti- Oppression</li> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<p><b>Competency: Governance</b></p>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Bargaining Unit and Local calendar dates</li> <li>• Plan and schedule meetings with the grievor(s), and grievance meetings with members on labour relations issues</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that detailed records/notes of any/all discussions with grievor regarding the potential disputes/actual disputes are maintained</li> <li>• Maintain an ongoing list of grievances/status including timelines</li> <li>• Ensure that the Bargaining Unit President and Labour Relations Officer receive copies of fact sheets, signed grievance form and all other relevant documents in a timely manner</li> <li>• Maintain current and past grievance files</li> <li>• Develop and maintain a process to track and ensure disciplines are removed from an employee’s file in accordance with the collective agreement</li> <li>• Maintain records of issues brought forward on Human Rights &amp; Equity (HRE) Issues</li> <li>• Maintain privacy of personal health information</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> </ul>

## **Labour-Management Committee**

Also known as an association-agency committee, or in the hospital sector as Hospital-Association Committee [HAC]; may also be referred to as the professional committee under some collective agreements.

The purpose of the labour-management committee is outlined in the collective agreement and may include promoting and providing effective and meaningful communication of information and ideas including but not limited to workload measurement tools, the promotion of best practices, matters related to orientation and in-service education/programs. In most collective agreements, this committee is charged with the responsibility of reviewing and resolving professional practice concerns and ensuring there is ongoing feedback between the union's leaders, membership, and ONA staff on the status of issues.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Strive to continuously learn about:
  - The ONA constitution and ONA statement of beliefs
  - Local financial policies and budget related payment for attending meetings
- Build effective working relationships with the members of the Bargaining Unit leadership team, employer, Labour Relations Officer(s) and members
- Attend Bargaining Unit meetings
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only). The Committee Chair ensures that the minutes are securely stored.
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA sponsored e-mail account, where available, only for bargaining unit work (i.e. not using employer e-mail)
- Ensure that the terms of reference for the committee are reviewed annually
- Develop an effective working relationship with the employer to resolve issues as expeditiously as possible, including working collaboratively to develop agendas, plan and schedule labour-management meetings and unit meetings to discuss the status of professional practice issues

- Ensure and participate in a process to turn over files to an incoming labour-management co-chair and or committee members

### **Priority: Members Informed: Empowering you with the information you value**

- Foster awareness among the membership about:
  - Who their bargaining unit leaders are and how to contact them
  - How to access the current collective agreement, either hard copy or an electronic version and available ONA resources (e.g. eLearning, workshops, etc.)
  - The work of the labour-management committee meetings by circulating information to the Bargaining Unit leadership team, Unit Representatives and membership (e.g., via e-mail, bulletin boards, Local/Bargaining Unit website)
- Foster a sense of advocacy by encouraging the membership to familiarize themselves with the collective agreement and with available ONA resources
- Ensure that the process includes feedback to members on the disposition of their issues (Opportunities could include Bargaining Unit meetings, Unit meetings, Unit Representative e-scan report back reports, emails, and face-to-face communications)
- Coache and mentor members and Unit Representatives on the professional responsibility process, ensuring that they understand how to complete the form and the steps in the process

### **Priority: Members Supported: Supporting you to achieve better work conditions**

- Establish and communicate the process for members to:
  - Provide input to the ONA labour-management committee regarding issues/concerns, emails, polls surveys, etc.
  - Gather workload complaints from the Unit Representatives, including how/where the forms can be found, electronic or hardcopy, how to complete the forms, how to ensure that the form is submitted appropriately (i.e., submitting a copy of the form to the Bargaining Unit President and Labour Relations Officer)
- Liaise with Unit Representatives, and the grievance chair as needed, to gather input from members and provide feedback on issues
- Support and encourage members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)
- Plan and schedule labour-management meetings and unit meetings to discuss the status of professional practice and other issues (e.g., non-grievance related, concerns regarding policies), ensure ONA committee members are released to

attend such meetings and that their collective agreement rights regarding payment are enforced

- Ensure the following standing agenda items are included where relevant:
  - Workload issues, allowing for dedicated time to discuss issues and develop strategies for early resolution, such as workload issues of broader concern (i.e., systemic problems)
  - Seasonal closures, program changes and agency usage tracking

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Continuously acquire knowledge in the following areas:
  - Administration and enforcement of the collective agreement, including payment for attendance at meetings
  - Relevant legislation, employer policies and regulatory bodies' standards
  - The professional responsibility process in the collective agreement
  - Their role as a committee member as defined under the collective agreement
- Demonstrate advocacy for:
  - A quality practice environment and safe quality patient care
  - Professional development education and in-service education programs for ONA members where there is no professional development committee
- Ensure files are progressing in a timely manner by:
  - Maintaining a standing item on the agenda for all unresolved workload issues and maintaining an action plan and a tracking tool for these unresolved issues
  - Adhering to the timelines and process outlined in the collective agreement
- Identify educational opportunities to help other members grow their knowledge and understanding of the process
- Build an effective working relationship with the Labour Relations Officer or Professional Practice Specialist (PPS) by:
  - Ensuring they receive a copy of the meeting minutes
  - Inviting the Labour Relations Officer, or PPS as needed, to meetings where issues have stalled with the employer
  - Ensuring that the PPS receives copies of workload forms, tracking form tools and action plans in a timely manner
- The ONA committee chair liaises with the grievance chair to discuss/develop strategies around grievance matters which may impact concerns raised at labour-management meetings and/or grievance committee meetings

- Maintain records of workload complaints, tracking forms tools and action plans and signed minutes of settlement

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously works towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan benefits</li> <li>• ONA provincial policies</li> <li>• Local policies and Local finance</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Labour Relations</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration, and enforcement</li> <li>• Relevant legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA))</li> <li>• Employer policies</li> <li>• Regulatory body standards</li> <li>• The professional responsibility process in the collective agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process – Multi-Sector or Sector-Specific</li> <li>• Facing Professional Practice Concerns: What You Can Do</li> <li>• CNO Standards and Accountabilities</li> <li>• Conducting Effective Meetings</li> <li>• LEAP: CNO Complaints and Reports</li> <li>• Making it Count at Labour-management Meetings</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Support and model ONA’s mission, vision and values at the Local and Bargaining Unit levels</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• It's More Than Social Media</li> <li>• Scope of Professional Practice</li> </ul>
<p><b>Visionary</b></p> <ul style="list-style-type: none"> <li>• Communicate the “big” picture to members</li> <li>• Think strategically, problem-solve and move Bargaining Unit activities forward</li> </ul>	<ul style="list-style-type: none"> <li>• Provincial Leadership Meeting</li> <li>• Leadership Summit</li> <li>• LEAP: CNO Health Inquiries and the Nurses’ Health Program</li> <li>• LEAP: Investigations Beyond the CNO</li> <li>• Attending Area Coordinators Conference</li> <li>• Provincial Coordinator Meetings</li> </ul>

Competencies	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment, and safe, quality patient care</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement, particularly the professional responsibility workload reporting process.</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• Sector specific Contract interpretation workshops (i.e. Homes Central Contract Interpretation or Hospital Central Contract Interpretation)</li> <li>• Basic Introduction to Human Rights</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Coach and mentor members and Unit Representatives on the professional responsibility process</li> <li>• Supports members to access ONA resources (i.e. guides, workshops, tip sheets, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy, Proficiency and Professionalism</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Has a communication plan to gather information/labour relations issues from the membership</li> <li>• Report back to the membership on workload issues and issues tabled at meetings in a timely manner</li> <li>• Disseminate information from ONA at the provincial level/Local level to the membership (e.g., newsletters, e-mail blasts, union meetings), and vice versa, fostering 2-way communication</li> <li>• Ensure that the Labour Relations Officer and/or PPS is kept in the loop on all relevant issues, is invited to and meetings as needed, and minutes of meetings are accessible to them as well as members</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• Working with Unregulated Care Providers</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> </ul>

Competencies	Competency/Skill Development Opportunities
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build effective relationships with both the Bargaining Unit leadership team and Bargaining Unit members (e.g., ensures that union orientation occurs, members are aware of how to contact their Bargaining Unit President/Union Representative, meetings dates are posted, etc.)</li> <li>• Liaise with the grievance chair as needed on issues</li> <li>• Build an effective relationship with the (Labour Relations Officer) and PPS</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> <li>• CNO Quality Assurance Learning Plans</li> <li>• Ask a Specialist</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Plan and schedule labour-management meetings and unit meetings to discuss the status of professional practice and other issues (e.g., non-grievance related, concerns regarding to policies)</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that minutes of labour-management meetings are secured and posted for the membership</li> <li>• Maintain records of workload complaints, tracking form tools and action plans and signed minutes of settlement</li> <li>• Ensure that the Labour Relations Officer receives copies of workload forms, tracking form tools, action plans in a timely manner (as per the process)</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> </ul>

## Unit Representative

This role represents the true grassroots of ONA leadership. The Unit Representative holds a cornerstone role within the union. The Unit Representative is “the eyes and ears” on union matters at the unit level, ensuring that information and collective agreement violations are reported to the appropriate member of the Bargaining Unit leadership team and assists in sharing and/or disseminating information as requested by the leadership team back to the unit.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA’s values
- Understand and promote ONA’s strategic plan
- Ensure confidentiality is maintained of members’ information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location)
- Request alternative representation to deal with issues/support members if a conflict-of-interest situation exists
- Is aware of yearly meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinator, Provincial Coordinator Meetings, Biennial Convention, etc.), attending where required
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Bargaining Unit Team, employer, Labour Relations Officer(s) and members
- Ensure and participate in the process to turn over files to an incoming Unit Representative

### **Priority: Members Informed: Empowering you with the information you value**

- Foster awareness among the membership about:
  - Identifying themselves as the Unit Representatives to all new members and managers on the floors/units
  - Who their bargaining unit leaders are and how to contact them, by ensuring representative names and contact information for all Units is posted on each floor/unit, including all contact information for committee chairs
  - How to access the current collective agreement, either hard copy or an electronic version and available ONA resources (e.g. eLearning, workshops, etc.)
  - How to access ONA resources (i.e. guides, workshops, tip sheets, etc.)

- Foster a sense of advocacy by encouraging the membership to:
  - Familiarize themselves with the collective agreement, in particular articles related to the grievance procedure, health and safety, return to work, professional practice and workload reporting process, human rights, etc.)
  - Support and educate members on completing workload forms, ensuring that the Bargaining Unit President is copied on all forms completed
  - Contact their grievance chair with contract administration issues in a timely way to ensure grievance timelines are met
  - Contact their Bargaining Unit President or designate regarding LEAP, WSIB or ONA Benefits issues
  - Familiarize themselves with available ONA resources and supporting their access to them
- Support member engagement by:
  - Following the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
  - Educating members on their collective agreement rights, grievance process and workload reporting process
  - Following the process in their Bargaining Unit to update the Executive Booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)
- Is the conduit for communication from the Bargaining Unit President (including Local and Provincial communications) to the members on the unit.

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Has an awareness of and advocates for members on labour relations matters arising out of the collective agreement (e.g. scheduling concerns, workload issues, H&S issues, professional issues, human rights issues, attendance management program issues, human rights and equity issues etc.)
- Is the *eyes and ears* on the unit regarding labour relations issues and concerns and reports such concerns to the appropriate member of the Bargaining Unit leadership team.
- May represent members in meetings with the manager (liaising with the Bargaining Unit President or their designate)
- Actively monitors unit/employer policies, reporting any violations to the Bargaining Unit President

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Report back to the Bargaining Unit leadership team on trends, issues of concern, etc. on a regular basis - i.e., at least monthly
- Gather and collect information to report to the Bargaining Unit leadership team for follow up or next steps
- Liaise as needed with the Bargaining Unit President and committee chairs
- Ensure that a report back is provided to the Bargaining Unit leadership team on any meetings attended involving members and the manager or other employer representative
- Works collaboratively with all members of the Bargaining Unit leadership team

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• Knowledge of the ONA constitution and statement of beliefs</li> <li>• Knowledge of ONA health and welfare benefits</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner's Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b></p> <ul style="list-style-type: none"> <li>• Basic collective agreement knowledge, administration, and compliance</li> <li>• Knowledge of employer policies</li> </ul>	<ul style="list-style-type: none"> <li>• The Power of the Occupational Health and Safety Act, ONA and You</li> <li>• Professional Responsibility Workload Reporting Process</li> <li>• Basic Intro to Human Rights</li> <li>• Anti-Racism and Anti-Oppression Advocacy 101 Digital Toolkit</li> <li>• Health and Safety: What You Need to Know</li> <li>• Facing Professional Practice Concerns: What You Can Do</li> <li>• Working with Unregulated Care Providers</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA's values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• LEAP: CNO Complaints and Reports</li> <li>• LEAP: CNO Health Inquiries and the Nurses' Health Program</li> <li>• It's More Than Social Media</li> <li>• LEAP: Investigations Beyond the CNO</li> <li>• Return to Work and Accommodation</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement</li> <li>• Mentor new employees on the value of the union, and becoming a member with entitlements, and becoming active in the union</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Facing Professional Practice Concerns: What you can do</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• CNO Standards and Accountabilities</li> <li>• Basic Introduction to Human Rights</li> <li>• Scope of Professional Practice</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• The Education Brochure</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Foster awareness of who the BU leaders are and that their contact information is readily available</li> <li>• Disseminate information from the Bargaining Unit Leadership Team to the Bargaining Unit membership as required and vice versa, fostering two-way communication</li> <li>• Ensure that members are aware of how to update their membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process - Lecturette</li> <li>• Resolving Conflict</li> <li>• Conducting Effective Meetings</li> <li>• eLearning: ONA's Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• Violence Risks and Risk Assessments for Community Health Care Workers</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build effective relationships with both the Bargaining Unit leadership team and the members on the unit</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<p><b>Competency: Governance</b></p>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit dates (Local meetings, Bargaining Unit meetings, Labour-management meetings etc.)</li> <li>• Attend meetings as required</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>

<b>Competencies and Accountabilities</b>	<b>Competency/Skill Development Opportunities</b>
<b>File Management</b> <ul style="list-style-type: none"><li>• Assist the Bargaining Unit President in maintaining an accurate contact listing for Unit members</li><li>• Assist with Bargaining Unit forms as appropriate and as required</li></ul>	<ul style="list-style-type: none"><li>• Microsoft Teams for Local Leadership</li></ul>

## Health and Safety Representative

Health & Safety Representatives are key to assisting ONA in achieving its beliefs that “it is the right of all its members to work in a healthy and safe work environment. It further believes in the pursuit of the highest degree of physical, mental, and social well-being of workers in all occupations. As one of the largest health care unions in the province and in the country, ONA believes it is part of its mandate to exercise a strong leadership role in achieving progressively greater gains in the field of occupational Health & Safety. Health & Safety Representatives are key advocates for membership in ensuring their legal rights to a safe work environment (legislative and under the collective agreement) are enforced.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Ensure confidentiality is maintained of members’ information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location)
- Act in alignment with ONA’s values
- Understand and promote ONA’s strategic plan
- Awareness of key provincial and Local calendar dates
- Network with other health and safety reps around the province
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Bargaining Unit Team, employer, Labour Relations Officer(s) and members
- Ensure and participate in the process to turn over files to an incoming Health & Safety Representative

### **Priority: Members Informed: Empowering you with the information you value**

- Foster advocacy among the membership related to health & safety by:
  - Ensuring members are aware of how to contact their Health & Safety Representative
  - Raising awareness of who the Bargaining Unit leaders are and how to locate their contact information
  - Encouraging members to familiarize themselves with the collective agreement, in particular articles related to health & safety
  - Reporting on issues to the Bargaining Unit President and members at Bargaining Unit meetings
  - Disseminating information from ONA on health & safety issues and strategies, including outcomes of issues, to the Bargaining Unit

President, Unit Representatives and the membership (e-scan reports, meeting minutes, Bargaining Unit meetings, etc.)

- Follow the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Educate members on their collective agreement rights and grievance process
- Follow the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)
- Raise awareness among membership about ONA's work in health & safety by promoting:
  - ONA's health & safety caucus dates
  - Health & safety scholarships to membership
  - ONA educational resources related to health & safety and encouraging members to access these educational resources

### **Priority: Members Supported: Supporting you to achieve better work conditions**

- Advocate for safe workplaces - including the physical and mental safety of members - and quality patient care by:
  - Ensuring the ONA Bargaining Unit has representation on the joint health & safety committee (JHSC) in accordance with the Occupational Health and Safety Act (OHSA) and the collective agreement
  - Advocating for a process for members to forward their health & safety concerns
  - Attending meetings as scheduled, conducting workplace inspections as needed
- Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Attend ONA's annual health and safety caucus
- Develop and maintain current knowledge of:
  - ONA (i.e. relevant service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Collective agreement, administration and enforcement, including payment/salary reimbursement for meetings under the collective agreement, and arranging for time off during working hours to attend meetings

- Relevant legislation (e.g., Occupational Health and Safety Act Workplace Safety Insurance Act including specifically those provisions that empower workers), and regulatory bodies' standards.
  - Employer policies
  - ONA's health & safety and return to work/accommodation service delivery accountabilities.
- Advocate for safe workplace rights by supporting members to exercise their rights under the collective agreement and OHSa by:
  - Ensuring that committee members are paid as per the OHSa for time spent on prep meetings, meetings, and workplace inspections and elevating issues with the Bargaining Unit President where violations exist
  - Establishing a process, including a standing agenda item, for the annual review of employer policies and procedures by the JHSC that impact the health & safety of workers
  - Ensuring the health & safety committee is involved in renovations and new construction planning, including regular committee updates, front-line member input in the planning stage, risk assessments completed and mock-up exercises for frontline member feedback
  - Ensuring that there is a process in place to explore options and strategies for unresolved issues (e.g., Ministry of Labour complaint, letter to the senior executive and/or the Board of Directors, grievances, labour-management meetings, negotiations)
  - Gathering facts, issues and trends from members, Unit Representatives etc. for agenda items for meetings
  - Ensuring the accuracy of meeting minutes and ensuring that minutes are distributed appropriately, including the employer posting them on the on the bulletin board
  - Identifying gaps and concerns for potential contract proposals
  - In consultation with the Bargaining Unit President, ensuring that the Labour Relations Officer is kept apprised of unresolved issues to determine next steps
  - Reporting to Bargaining Unit President/Bargaining Unit leadership team and/or Labour Relations Officer regarding issues and trends
- Promote building bargaining unit capacity to address health & safety issues by:
  - Advocating for ONA Representatives to receive "certification training" and other training as identified
  - Identifying educational opportunities in health & safety to help others grow, forwarding educational needs to the Bargaining Unit President for Local consideration
  - Mentoring leaders, members, and Unit Representatives about their rights on health & safety issues (e.g., one-to-one contact, Unit Representative meetings, newsletters, Bargaining Unit meetings etc.)

- Liaise with the Regional Vice-President with the health & safety portfolio as needed
- Provide personal membership contact information to the Bargaining Unit President for records retention

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity seeking/deserving groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression (ARAO) approaches and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan benefits</li> <li>• ONA provincial policies</li> <li>• Knowledge of health &amp; safety service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement knowledge, administration, and compliance</li> <li>• Knowledge of relevant legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA))</li> <li>• Knowledge of relevant employer policies</li> <li>• Knowledge of health &amp; safety, accommodation and return to work service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Health and Safety: What You Need to Know</li> <li>• Joint Health and Safety Committee Toolkit</li> <li>• The Power of the Occupational Health and Safety Act, ONA and You</li> <li>• Workplace Safety and Insurance Board Workshop</li> <li>• Disability Income Protection Plans</li> <li>• Advocacy in Action 101</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Support and models ONA’s mission, vision and values at the Local and Bargaining Unit levels</li> <li>• Maintain confidentiality and privacy of membership information</li> <li>• Act in alignment with ONA’s values</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• Resolving Conflict</li> <li>• Conducting Effective Meetings</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership and quality patient care</li> <li>• Advocate for health &amp; safety needs in the workplace</li> <li>• Advocate for both the physical and mental well-being of members</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement in particular articles related to health and safety</li> </ul>	<ul style="list-style-type: none"> <li>• Health and Safety Caucus</li> <li>• Advocacy in Action 101</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• H&amp;S: What you need to know</li> <li>• Health and Safety: Now That You Know</li> <li>• Health and Safety: Taking It One Step Further</li> <li>• Return to Work and Accommodation</li> <li>• Return to Work and Accommodation: Representing Members with Mental Health Illnesses or Injuries</li> <li>• Making it Count at Investigations and Disciplinary Meetings</li> <li>• ONA’s Investigation Guide to Fatality, Critical Injury, Illness, Accident and Exposure</li> <li>• Violence: Be Savvy and Safe</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.).</li> <li>• Mentor leaders, members and unit representatives on health &amp; safety issues</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Member Engagement</b>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Has a communication plan to collect data, track trends and report to the Bargaining Unit President with feedback loops to members on the disposition of the issues</li> <li>• Foster awareness of who the Bargaining Unit leaders are and where their contact information is readily available.</li> <li>• Disseminate information from ONA on health &amp; safety issues and strategies to bargaining unit members and from members to Bargaining Unit leadership team, ensuring two-way communication</li> <li>• In consultation with the Bargaining Unit President, liaise with the Labour Relations Officer and/or the health &amp; safety specialist when necessary</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: ONA's Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• It's More Than Social Media</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build an effective relationship with Bargaining Unit members (e.g., ensure that members are aware how to contact their Health &amp; Safety Representative)</li> </ul>	<ul style="list-style-type: none"> <li>• Basic Introduction to Human Rights</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key provincial and Local calendar dates</li> <li>• Attend meetings as scheduled, conducts workplace inspections as needed</li> <li>• Promote and attend health &amp; safety caucus</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and secure all health &amp; safety files, ensuring that records are secured within the Bargaining Unit records retention system</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> </ul>

## **Safe Return to Work/Accommodation Representative**

The safe return-to-work (SRTW)/work accommodation representative is essential in supporting members in their return to work (enforcing their legal and contractual rights). The SRTW/work accommodation representative is charged with the responsibility for ensuring the appropriate Bargaining Unit leaders and Labour Relations Officer are notified of any violation of member's rights as soon as possible in the process.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Ensure confidentiality is maintained of members' information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location)
- Attend Bargaining Unit meetings
- Inform the Local Secretary and or the Bargaining Unit President of extended leaves
- Be aware of caucus dates (e.g., health & safety and human rights and equity) and Local meetings
- Build effective working relationships with the members of the Bargaining Unit team, employer, Labour Relations Officer(s) and members
- Ensure and participate in process to turn over all files to an incoming SRTW/Accommodation Representative

### **Priority: Members Informed: Empowering you with the information you value**

- Foster a sense of advocacy among the membership by:
  - Encouraging members to familiarize themselves with the collective agreement articles related to return to work and all duties to accommodate
  - Educating members about their rights in relation to:
    - Disclosure of personal health information to employee health services
    - Members' rights to see their own physician. (see Guide to Attendance Management)
  - Monitoring to ensure the employer has made workers on the unit aware of the returning worker's restrictions and how they can support the worker and the plan, and if not advises the Bargaining Unit President

- Foster awareness of who the Bargaining Unit leaders are and where their contact information is available
- Provide ongoing communication and support with members regarding their WSIB and long-term disability (LTD) claims
- Follow the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Follow the Bargaining Unit's process to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)

### **Priority: Members Supported: Supporting you to achieve better work conditions**

- Advocate for membership needs at the Bargaining Unit level by:
  - Notifying members of their right to representation in accommodation matters
  - Where possible, ensuring union representation in all modified/accommodated work plans
  - Ensuring that grievances are filed in a timely manner, via the Labour Relations Officer, Bargaining Unit President and Grievance Chair
  - Consulting with Labour Relations Officer regarding impact of modified work on short-term disability (STD), LTD and WSIB and when dealing with difficult accommodation issues. Must have approval of Labour Relations Officer prior to waiving any job posting (as per ONA policy).
  - Identifying gaps/concerns to Bargaining Unit President for potential proposal development
- Identify to Bargaining Unit President members *unwilling* to have ONA representation so the Bargaining Unit President can speak to the Labour Relations Officer and send communication to member
- Support the member and the work unit to achieve successful accommodation, recognizing that the impact of disability can be devastating to the worker
- Provide ongoing feedback to Bargaining Unit President/Labour Relations Officer on status of return to work/accommodations
- Develop and maintain a tracking tool that identifies all permanently accommodated workers, description of their permanent accommodations and those off on STD/LTD/WSIB with dates and their units
- Maintain ongoing discussion with Labour Relations Officer on files where members are not readily accommodated by the employer in their current position

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:

- ONA (i.e. relevant service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
- Collective agreement, administration and enforcement, including payment/salary reimbursement for meetings and arranging for time off during working hours to attend meetings
- Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act), and regulatory bodies' standards.
- Employer policies
- ONA's accommodation and SRTW service delivery accountabilities, SRTW/accommodation guide and attendance management guide
- The union's duty to accommodate (shared obligation with employer as per ONA policy)
- Develop and maintain awareness of:
  - Any employee assistance plans (EAPs) if any
  - ONA health and welfare benefits and employer benefits
- Identify learning needs and educational opportunities to help others grow/understand the duty to accommodate under the legislation and employer/union/worker obligations in supporting the return-to-work process
- Ensure that the Labour Relations Officer and Bargaining Unit President sign off on all permanent accommodation work arrangements
- Liaise with occupational health & safety representative and the Bargaining Unit benefits representative

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity seeking/deserving groups and our obligations under the Ontario Human Rights Code
- Continuously works towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA constitution and statement of beliefs</li> <li>• ONA’s return to work/accommodation guide</li> <li>• ONA’s accommodation and return to work/ service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b></p> <ul style="list-style-type: none"> <li>• Collective agreement knowledge, administration, and enforcement</li> <li>• Knowledge of relevant legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA))</li> <li>• Knowledge of relevant employer policies</li> <li>• Knowledge of Ontario Human Rights Code (OHRC)</li> </ul>	<ul style="list-style-type: none"> <li>• The Power of the Occupational Health and Safety Act, ONA and You (120 min lecturette)</li> <li>• Basic Intro to Human Rights</li> <li>• Health and Safety: What You Need to Know</li> <li>• Return to Work and Accommodation</li> <li>• Representing Members with Mental Health Illnesses or Injuries</li> <li>• Disability Income Protection Plans</li> <li>• WSIB 101</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Support and model ONA’s mission, vision and values at the Local and Bargaining Unit levels</li> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• LEAP: CNO Complaints and Reports</li> <li>• LEAP: CNO Health Inquiries and the Nurses’ Health Program</li> <li>• LEAP: Investigations Beyond the CNO</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement relevant to return to work/accommodation</li> <li>• Advocate for membership needs at the Bargaining Unit (e.g., education, budget needs, servicing supports)</li> <li>• Advocate for membership in regard to return to work/accommodation issues</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• CNO Standards and Accountabilities</li> <li>• Health and Safety: Now That You Know</li> <li>• Health and Safety: Taking It One Step Further</li> <li>• Making it Count at Return to Work/Accommodation meetings</li> <li>• Harassment, Mobbing and Bullying (Non-Code)</li> <li>• Violence: Be Savvy and Safe</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Support members to access ONA resources relevant to return to work/accommodation (i.e. guides, workshops, tip sheets, etc.)</li> <li>• Liaise with other members of the Bargaining Unit leadership teams and supports them in their roles</li> <li>• Educate members on their role in the process and the duty to accommodate</li> </ul>	<ul style="list-style-type: none"> <li>• Health and Safety Caucus</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Develop a communication plan to gather information regarding return to work (RTW)/accommodation issues from the membership to the Bargaining Unit leadership team and vice-versa, fostering two-way communication</li> </ul>	<ul style="list-style-type: none"> <li>• ONA’s Investigation Guide to Fatality, Critical Injury, Illness, Accident and Exposure</li> <li>• Conducting Effective Meeting</li> <li>• Resolving Conflict</li> <li>• It’s More than Social Media</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build effective relationships with both the Bargaining Unit leadership team and the members</li> <li>• Ensure that members are aware of how to contact their RTW/accommodation and health &amp; safety reps</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<p><b>Competency: Governance</b></p>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Promote awareness of caucus dates (e.g., health &amp; safety and human rights and equity)</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>

Guide to Leadership Accountabilities and Competencies: Safe Return to Work/Accommodation Representative

<b>Competencies and Accountabilities</b>	<b>Competency/Skill Development Opportunities</b>
<b>File Management</b> <ul style="list-style-type: none"><li>• Ensure the Bargaining Unit President has all relevant RTW/accommodation files</li></ul>	<ul style="list-style-type: none"><li>• Microsoft Teams for Local Leadership</li></ul>

## Human Rights and Equity Representative

To ensure ONA fulfills its goals expressed in the ONA statement of beliefs, which are to promote equity and diversity in the workplace and protect members' legal and contractual rights to work in environments that are free from harassment and discrimination.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Ensures confidentiality is maintained of members' information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location)
- Network with other human rights and equity (HRE) representatives around the province
- Use an ONA e-mail account where available, for bargaining unit work (i.e. does not use the employer e-mail).
- Is aware of yearly meetings, committee meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Bargaining Unit team, employer, and members
- Ensure and participate in the process to turn over files to an incoming HRE representative

### **Priority: Members Informed: Empowering you with the information you value**

- Raise awareness among membership about ONA's work in HRE by promoting:
  - ONA's HRE caucus dates and the HRE subsidy to membership
  - The diverse events ONA promotes and supports across the province such as Pride events, Toronto Caribbean Carnival, Carnival North
  - ONA's educational resources and, members to access them
  - Following the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
  - Following the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)
- Foster advocacy among the membership related to HRE, by:

- Ensuring members are aware how to contact their return to work/accommodation/HRE representative
- Fostering awareness of who the Bargaining Unit leaders are and how to contact them
- Reporting on issues to the Bargaining Unit President and members at Bargaining Unit meetings
- Fostering a sense of advocacy by encouraging members to familiarize themselves with:
  - The collective agreement, in particular articles related to human rights and equity
  - ONA's anti-racism and anti-oppression action plan and related initiatives
- Serve as the Local or Bargaining Unit liaison with the ONA provincial HRE Team and ensure feedback to the members

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Advocate for membership needs at the Bargaining Unit level (e.g., education, budget needs, servicing supports) by:
  - Advising the appropriate chair of Bargaining Unit committees on issues to be raised with management respecting human rights, discrimination, and harassment (e.g., labour-management, occupational health and safety, grievance, etc.)
  - Collaborating with the safe return to work representative on advocating for membership on return-to-work issues that are human rights related
  - Assisting Bargaining Unit committees with review of other employer policies for compliance with the collective agreement and the Ontario Human Rights Code
  - Documenting and tracking incidents of discrimination and harassment and communicating those to Bargaining Unit President
- Act as the communication link between the Bargaining Unit and the Bargaining Unit President by:
  - Developing and maintaining a communication plan that gathers information regarding HRE issues from the membership
  - Identifying gaps/concerns for potential contract proposals
- Build an effective relationship with Bargaining Unit members

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:

- ONA (i.e. relevant service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Collective agreement, administration and enforcement, including payment/salary reimbursement for meetings and arranging for time off during working hours to attend meetings
  - Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act), and regulatory bodies' standards.
  - Employer policies
  - ONA's attendance management guide, accommodation and return to work service delivery accountabilities, and access ONA's harassment & discrimination policy
  - Relevant ONA resources related to human rights & equity and anti-oppression and anti-racism
- Identify educational opportunities for members and assist the Bargaining Unit and Local in the coordination of formal education pertaining to HRE, anti-racism and anti-oppression

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a HRE lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Document/track incidents of discrimination and harassment in the workplace and forward information to the Bargaining Unit President for the purposes of report backs/enviroscans
- Identify emerging trends and liaise with Bargaining Unit President
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA constitution and statement of beliefs</li> <li>• ONA’s attendance management guide</li> <li>• ONA’s accommodation and return to work service delivery accountabilities</li> <li>• Relevant resources related to human rights &amp; equity and anti-racism and anti-oppression</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Basic Introduction to Human Rights</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement including administration and enforcement</li> <li>• Relevant legislation (e.g., Occupational Health and Safety Act (OHSA), Workplace Safety and Insurance Act (WSIA))</li> <li>• Relevant employer policies</li> <li>• Ontario Human Rights Code</li> </ul>	<ul style="list-style-type: none"> <li>• Human Rights and Equity Caucus</li> <li>• Sector specific Contract interpretation workshops (i.e. Homes Central Contract Interpretation or Hospital Central Contract Interpretation)</li> <li>• Advocacy in Action 101</li> <li>• The Power of the Occupational Health and Safety Act, ONA and You</li> <li>• Workplace Safety and Insurance Board</li> <li>• Disability Income Protection Plans</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Support and model ONA’s mission, vision and values at the Unit levels</li> <li>• Maintain confidentiality and privacy of membership information</li> <li>• Act in alignment with ONA’s values</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• Facing Professional Practice Concerns</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Collaborate with Safe Return to Work representative by advocating for membership on return-to-work issues related to HRE</li> <li>• Advocate for membership needs at the Bargaining Unit level (e.g., education, budget needs, servicing supports)</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement in particular articles related to HRE</li> </ul>	<ul style="list-style-type: none"> <li>• Human Rights and Equity Caucus</li> <li>• Return to Work and Accommodation</li> <li>• Representing Members with Mental Health Illnesses or Injuries</li> <li>• Resolving Conflict</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>Identify educational opportunities to help others grow</li> <li>Knowledge of available education resources related to HRE and ARAO and encourages members to access these educational resources</li> </ul>	<ul style="list-style-type: none"> <li>The Mentoring Toolkit</li> <li>The Workshop Calendar</li> <li>The Education Brochure</li> <li>Leadership Summit</li> <li>Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>Foster awareness of who the Bargaining Unit leaders are and where their contact information is readily available</li> <li>Disseminate information from the Bargaining Unit leadership team to the Unit membership as required and vice versa, fostering 2-way communication</li> <li>Document/track incidents of discrimination and harassment and communicate to Bargaining Unit President</li> </ul>	<ul style="list-style-type: none"> <li>eLearning: ONA's Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>It's More Than Social Media</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>Build an effective relationship with Bargaining Unit members</li> <li>Ensure members are aware how to contact their return to work/accommodation/HRE representative</li> </ul>	<ul style="list-style-type: none"> <li>Executive Skills II: Leadership Moving Forward</li> <li>Making it Count at Investigations and Disciplinary Meetings</li> </ul>
<p><b>Competency: Governance</b></p>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>Awareness of key provincial and Local calendar dates</li> <li>Promote HRE caucus dates</li> <li>Promote HRE caucus subsidy to membership</li> <li>Promote various diverse events</li> </ul>	<ul style="list-style-type: none"> <li>ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>Ensure that the Bargaining Unit President has all information related to HRE files</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Teams for Local Leadership</li> </ul>

## **Professional Responsibility and Workload Representative**

The Professional Responsibility and Workload (PRW) Representative assists and supports members in addressing their professional responsibility and workload concerns. In conjunction with the Bargaining Unit President, they ensure professional responsibility and workload (PRW) concerns are processed in a timely and effective manner.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Use an ONA e-mail account where available, for bargaining unit work (i.e. does not use employer e-mail)
- Ensure confidentiality is maintained of members' information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location and in accordance with ONA policy)
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Bargaining Unit team, employer, Labour Relations Officer(s) and members
- Is aware of yearly meetings, committee meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Ensure and participate in the process to turn over files to an incoming professional responsibility and workload representative and/or committee members

### **Priority: Members Informed: Empowering you with the information you value**

- Raise awareness among membership about PRW concerns by:
  - Following the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
  - Following the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)
  - Promoting and supporting members access to ONA resources (i.e. guides, workshops, tip sheets, etc.), including professional practice concerns and Professional Responsibility Complaints: A guide for ONA Members.

- Raising awareness of the benefits of filling out the professional responsibility workload report (PRWRF)
- Providing a high-level e-scan report back on trends in the Bargaining Unit at membership meetings, ensuring confidentiality is maintained
- Posting and/or circulating minutes of labour-management meetings to members
- Foster a sense of advocacy by encouraging members to familiarize themselves with the collective agreement, in particular articles related to professional responsibility
- Foster awareness of who the Bargaining Unit leaders are, and where their contact information is available
- Ensure a communication plan is in place between the Bargaining Unit President, Bargaining Unit and ensure that members on the unit are kept apprised of the disposition of their issues

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Support members to advocate for a quality practice environment and safe patient care by:
  - Building an effective relationship with Bargaining Unit members
  - Assisting members with filling out PRWRF correctly and in a timely fashion
  - Coaching members on how to speak to their manager about their workload issues and how to present their reported workload issues and recommendations
  - Meeting with members who have completed the PRWRF prior to the labour-management meeting
  - Ensuring that members who have identified PRW concerns can attend labour-management meetings
  - Advising members to retain one copy of their form, send one to the manager of their unit and submit the remainder to the Bargaining Unit President (who will send a copy of the form to the PPS)
- Strive to provide excellent representation for members advocating for a quality practice environment and quality patient care through the professional responsibility workload process by:
  - Ensuring that the member, employer and Professional Practice Specialist receive copies of professional responsibility workload forms submitted
  - Meeting with members on the unit prior to labour-management meeting to identify concerns and strategies for resolution
  - Planning and scheduling prep meeting with members who have completed PRWRFs and applicable membership meetings

- Gathering evidence to support members' concerns, including data from the College of Nurses of Ontario (CNO), regulatory colleges and various nursing/health care associations
- Maintaining an action plan and tracking tools for all issues, including the disposition/outcome of recommendations and strategies implemented to address the concerns and recommendations to management
- In conjunction with the Bargaining Unit President, presenting recommendations at labour-management meetings, ideally with unit committee members, and ensures PRW issues are processed in accordance with the collective agreement
- Assists Professional Practice Specialist/Labour Relations Officer in preparing for a meeting(s) with the employer, mediation and/or independent assessment committee
- Mentoring members on reasonable settlements on issues and signing off on issues as expeditiously as possible
- Communicate professional responsibility trends, resolutions, and issues to the Bargaining Unit leadership team and Professional Practice Specialist

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - ONA (i.e. Professional responsibility service delivery accountabilities, ONA constitution and statement of beliefs, ONA health and welfare benefits, ONA provincial policies and Local policies)
  - Collective agreement administration and enforcement, including payment/salary reimbursement for meetings and arranging for time off during working hours to attend meetings
  - Relevant legislation (e.g., Occupational Health and Safety Act, Workplace Safety Insurance Act, Ontario Human Rights Code, Ontario Labour Relations Act)
  - Employer policies
  - Professional responsibility process in the collective agreement
  - College of Nurses of Ontario (CNO) and regulatory colleges, standards of practice, accountabilities, and guiding principles
  - Local finance policies relevant to professional practice issues/files
- Inform the Local budgeting process by identifying and discussing any potential and known financial impacts to the Bargaining Unit President, including the independent assessment committees scheduled
- Ensure issues are moving forward in a timely manner by:
  - Helping to ensure timelines are met in the collective agreement, where applicable

- Being aware of labour-management meeting dates and preparing as needed
- Building an effective working relationship with the Bargaining Unit President and Professional Practice Specialist and ensuring that they receive copies of PRW forms, tracking form tools, action plans in a timely manner (as per the process)
- Maintaining records of PRWRFs, tracking forms tools, action plans and signed minutes of settlement
- Follows the professional responsibility service delivery accountabilities for professional practice to ensure that issues move forward in a timely manner
- Establishing a working relationship with the employer to resolve professional practice concerns
- Build capacity in the Bargaining Unit to address professional responsibility workload concerns by:
  - Ensuring the Bargaining Unit President and/or their designate understands how to complete and utilize relevant forms such as the action plans and tracking tools to track issues
  - Identifying learning needs for the bargaining to the Bargaining Unit President
  - Communicating professional responsibility trends to the Bargaining Unit President via e-scan, so that Local/regional/provincial trends can be detected and communicated

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Apply a human rights and equity lens to all issues brought forward, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial policies</li> <li>• Local policies and Local finance, including those related to the professional responsibility workload reporting process</li> <li>• ONA health and welfare benefits</li> <li>• Professional responsibility service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101 – The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration and enforcement</li> <li>• Legislation (e.g., Regulated Health Professions Act)</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> <li>• Responsibility process in the collective agreement, where applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process – Multi-Sector or Sector-Specific</li> <li>• Facing Professional Practice Concerns: What You Can Do</li> <li>• CNO Standards and Accountabilities</li> <li>• Scope of Professional Practice</li> <li>• Working with Unregulated Care Providers</li> <li>• Conducting Effective Meetings</li> <li>• LEAP: CNO Complaints and Reports</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> <li>• LEAP: CNO Health Inquiries and the Nurses’ Health Program</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment and quality safe patient care</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with collective agreement, in particular any articles related to professional responsibility</li> <li>• Ensure that timelines of issues are met and adhered to as outlined in the collective agreement, where applicable</li> </ul>	<ul style="list-style-type: none"> <li>• Making it Count at Labour-management Meetings</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Advocacy in Action 101</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• LEAP: Investigations Beyond the CNO</li> <li>• Violence: Be Savvy and Safe</li> <li>• Ask a Specialist</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members with understanding the importance of completing workload forms</li> <li>• Assist members with completing workload forms</li> <li>• Coach members on how to present their concerns and recommendations to management</li> <li>• Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy, Proficiency and Professionalism</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Communicate professional responsibility trends, resolutions, and issues to the Bargaining Unit leadership team and Labour Relations Officer/Professional Practice Specialist.</li> <li>• Meet with members on the unit prior to labour-management meetings to identify concerns and strategies for resolution</li> <li>• Foster awareness of who the Bargaining Unit leaders are, and their contact information is available</li> <li>• Provide high-level e-scan report back on trends in the Bargaining Unit at membership meetings, ensuring confidentiality is maintained</li> <li>• Establish a communication plan to keep members informed on decisions and opportunities via web pages links, unit bulletins, minutes of meetings, unit reports, emails (using members personal email) and verbal reports at Bargaining Unit meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• Ask a Specialist -The PRW Process</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build an effective relationship with Bargaining Unit members</li> <li>• Build an effective relationship with Labour Relations Officer, Professional Practice Specialist and others as needed</li> <li>• Establish a working relationship with the employer to resolve professional practice concerns</li> <li>• Assist Professional Practice Specialist/Labour Relations Officer in preparing for a meeting(s) with the employer, mediation and/or independent assessment committee</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> <li>• CNO Quality Assurance Learning Plans</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Bargaining Unit and Local calendar dates</li> <li>• Awareness of labour-management meeting dates</li> <li>• Plans and schedules membership meetings</li> <li>• Ensures that members with workload concerns can attend labour-management meetings</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that minutes of labour-management meetings are secured and circulated to members</li> <li>• Maintain records of PRWRFs, tracking forms tools, action plans and signed minutes of settlement</li> <li>• Ensure that the Bargaining Unit President and Labour Relations Officer receive copies of PRW forms, tracking form tools, action plans in a timely manner (as per the process)</li> <li>• Maintain privacy of personal health information</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Ask a Specialist – Tracking and Building an Action Plan</li> </ul>

## **Professional Development Committee Representative**

To ensure that, where language exists for a professional development committee, ONA members are represented. The practice environment should support continuous learning, providing members with access to professional development opportunities.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Use an ONA e-mail account where available, for bargaining unit work (i.e. does not use employer e-mail)
- Ensure confidentiality is maintained of members' information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location and in accordance with ONA policy)
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Bargaining Unit team, the professional development committee, employer, Labour Relations Officer (s) and members
- Ensure and participate in the process to turn over files to incoming professional development committee members

### **Priority: Members Informed: Empowering you with the information you value**

- Raise awareness among membership about professional development issues by:
  - Fostering awareness of who the Bargaining Unit leaders are and posting contact information for committee representatives on ONA bulletin boards and the employer communication vehicles
  - Promoting professional development activities within the Bargaining Unit(s) (e.g., RN and health-care professional)
  - Reporting back to the membership on issues and how issues will be addressed
  - Posting minutes as per the Bargaining Unit process, incorporating issues, action plan, and next steps with timeline
  - Supporting members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)
- Establish a communication plan to keep members informed of decisions and opportunities and the disposition of their issues and how their issues will be addressed: web page links, unit bulletins, minutes of meetings, unit reports, emails, verbal reports at Bargaining Unit meetings

- Is aware of key Bargaining Unit and Local calendar dates, using them as an opportunity to report back to both the Bargaining Unit and Local on membership issues, recommendations, resolution, and educational opportunities
- Follow the Bargaining Unit's process to ensure new members are signed up
- Follow the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Support members on professional development issues by:
  - Fostering a sense of advocacy by encouraging members to familiarize themselves with collective agreement, in particular any articles related to professional development
  - Promoting initiatives that encourage equal access to professional development opportunities
  - Advocating for membership and quality practice environment and quality safe patient care
  - Seeking out members interested in professional development to join the committee
  - Identifying ONA, Ontario Federation of Labour, Canadian Labour Congress and Workers' Health and Safety Centre education workshops that are available to advance the nurses' professional development
  - Liaising with members of the Bargaining Unit to support them in their practice
  - Identifying members and/or experts to help meet identified learning of staff
  - Linking the Nursing Council of Ontario and labour-management minutes to identify potential learning needs
- Advocate on behalf of members regarding professional development issues by:
  - Gathering information/issues from members through one-on-one discussions, email correspondence and report back from unit representatives
  - Ensuring member issues are placed on meeting agendas
  - Promoting a positive practice environment that supports learning
  - Ensuring there is a process in place to communicate decisions and outcomes to members and Bargaining Unit leadership team
  - Advocating continuous learning and provides access to professional development opportunities provided by the employer
- Determine a sign-in process for members to ensure their salaries are reimbursed by the employer keeping pay whole as per the collective agreement

- Help ensure a process is in place to elect ONA members to the professional development committee as per collective agreement and/or constitution
- Establish the committee's goals for the year
- Identify educational opportunities to help others grow
- Through committee work, identify education budgets per unit/program, potential percentage of nursing budget toward employer education annually, for example, through the hospital fiscal advisory committee (FAC)

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - Collective agreement knowledge, administration, and enforcement including ensuring:
    - Consistent application of payment for professional development education under the collective agreement
    - The number of representatives on the committee are as outlined in the collective agreement (in the absence of language in the collective agreement, employer policy and/or practice applies)
  - ONA and Canadian Federation of Nurses' Unions education workshops that advance the nurses' professional development
  - Alternative funding initiatives such as RNAO, Registered Nurses Foundations of Ontario (RNFOO), bursaries, government funding, etc.
  - Knowledge of employer policies, including ensuring consistency in the application of payment for professional development education
- Build capacity within the bargaining unit to advocate on issues related to professional development including:
  - Keeping the Bargaining Unit President informed of ongoing work
  - Being aware of members' concerns (e.g. Survey membership for issues, suggestion boxes, etc.)
- Review terms of reference for the committee annually, making recommended changes as needed
- Ensure that minutes of committee meetings, action plans, and next steps with timelines are secured at the Bargaining Unit level
- Work collaboratively with the employer by:
  - Scheduling meetings for the year, ensuring minimum meetings are set as outlined in the collective agreement
  - Establishing and maintaining a line of communication with the Chief Nursing Officer or designate

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Support brand visibility

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Apply a human rights and equity (HRE) lens to issues, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Seek HRE educational opportunities for committee review
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial policies</li> <li>• ONA, CFNU education workshops that are available to advance the nurses’ professional development</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration, and enforcement</li> <li>• Legislation (e.g., Regulated Health Professions Act)</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• CNO Quality Assurance Learning Plans</li> <li>• LEAP: CNO Complaints and Reports</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> <li>• LEAP: CNO Health Inquiries and the Nurses’ Health Program</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment and quality safe patient care</li> <li>• Foster a sense of advocacy by encouraging members to familiarize themselves with collective agreement, in particular any articles related to professional development</li> <li>• Advocate for continuous learning and provide access to professional development opportunities provided by the employer</li> </ul>	<ul style="list-style-type: none"> <li>• Conducting Effective Meetings</li> <li>• Stronger Bargaining Units: Through Intergenerational Solidarity</li> <li>• Scope of Professional Practice</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Promote professional development activities within the Bargaining Unit</li> <li>• Identify educational opportunities to help others grow</li> <li>• Liaise with other members of the Bargaining Unit to support them in their practice</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Member Engagement</b>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>Establish a line of communication with the Chief Nursing Officers (CNO) or designate</li> <li>Establish a communication plan to keep members informed on decisions and opportunities via web pages links, unit bulletins, minutes of meetings, unit reports, emails (using members personal email) and verbal reports at Bargaining Unit meetings</li> </ul>	<ul style="list-style-type: none"> <li>Executive Skills I: Leading a Local</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>Build an effective relationship with Bargaining Unit members, the committee and the Bargaining Unit leadership team</li> </ul>	<ul style="list-style-type: none"> <li>Executive Skills II: Leadership Moving Forward</li> <li>Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>Ask a Specialist – Code of Conduct</li> <li>Ask a Specialist Membership Engagement and Bringing Professional Responsibility and Workload Issues Forward</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>Awareness of key Bargaining Unit and Local calendar dates</li> <li>Plan and schedule professional development meetings, ensuring minimum meetings set for year</li> </ul>	<ul style="list-style-type: none"> <li>ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>Review terms of reference for the committee annually</li> <li>Ensure that minutes of committee meetings, action plans, and next steps with timelines are secured at the Bargaining Unit level</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Teams for Local Leadership</li> </ul>

## Political Action Representative

Political action addresses the question “why we are here,” and helps to advance ONA’s strategic priority, Telling Ontarians’ the Truth. Actions in this area link to ONA’s vision and statement of beliefs in advancing the union’s objectives. There is a direct correlation between members engaging in political action and improving the quality of work life for ONA members on the front lines.

**Note:** Each Bargaining Unit will endeavour to elect a political action representative who will work in conjunction with Local/regional/provincial representatives, including regional political action committees.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA’s values
- Understand and promote ONA’s strategic plan
- Use an ONA e-mail account where available, for bargaining unit work (i.e. does not use employer e-mail)
- Ensure confidentiality is maintained of members’ information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location and in accordance with ONA policy)
- Attend Bargaining Unit meetings
- Build effective working relationships with the members of the Local executive and/or Bargaining Unit team, employer, Labour Relations Officer (s) and members
- Is aware of yearly meetings, committee meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Ensure and participate in the process to turn over files to an incoming political action representative

### **Priority: Members Informed: Empowering you with the information you value**

- Raise awareness among membership about political action by:
  - Supporting members access to ONA resources
  - Fostering a sense of advocacy by encouraging members to familiarize themselves with ONA resources (i.e. guides, workshops, tip sheets, etc.) related to political action and how to get politically active
  - Fostering awareness of who the bargaining unit leaders are and where their contact information is available

- Informing members in a timely way, about rallies and political action events, including actions shared/organized by the regional political action committee, coordinating and ensuring attendance
- Assisting in educating membership about ONA's political action activities
- Posting information related to affiliates, such as the Canadian Federation of Nurses Unions (CFNU), Canadian Labour Congress (CLC), Ontario Federation of Labour (OFL), Ontario Health Coalition (OHC)
- Following the Bargaining Unit's process to ensure new members are signed up and educated on the value of the union
- Following the process in their Bargaining Unit to update the executive booklet (i.e. ensuring names and personal e-mail addresses are updated so that communications can be received from ONA)
- Is aware of key Local and Bargaining Unit calendar dates to assist with the planning and distribution of information relating to political action events

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Support member engagement in policy action by:
  - Mentoring members on conducting political campaigns and community events
  - Assisting in developing and/or disseminating key messages for members to use when meeting with their elected representatives
  - Facilitating members to connect with MPPs, MPs, municipal politicians to move forward ONA's message
  - Providing examples/template letters for members to use

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Develop and maintain current knowledge of:
  - The collective agreement and relevant employer policies
  - How to access the MPP contact list found on the ONA website
  - ONA's constitution and statement of beliefs with respect to the political process (i.e. ONA does not endorse any political party but may support or oppose a party's position on a particular issue)
  - ONA's provincial campaigns and how to participate in them and access any available resources at the provincial level
  - ONA policy 26.11 *Funding for Community Activism and Local Political Action* and the process to be followed to request funding for events/actions
  - Any Local finance policies related to political action

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Develop a communication plan with the Bargaining Unit President, including developing and posting notices
- Communicate and support any political activity in the Local and/or Region, such as information/strike picket lines
- Plan a calendar of events
- Attend meetings
- Liaise with other political action representatives
- Develop phone trees
- Encourage participation in regional political action committee

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Apply a human rights and equity lens to all issues, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial and Local policies, including policy 26.11 Funding for Community Activism and Local Political Action</li> <li>• ONA provincial campaigns</li> </ul>	<ul style="list-style-type: none"> <li>• Becoming an ONA Representative: A Beginner’s Guide</li> <li>• Unionism 101- The History, The Impact, The Power</li> </ul>
<p><b>Contract Administration</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• Collective agreement administration, and enforcement</li> <li>• Employer policies</li> <li>• Regulatory bodies’ standards</li> <li>• MPP contact list on ONA Website</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Professional Responsibility Workload Reporting Process – Multi-Sector or Sector-Specific (Lecturette)</li> <li>• CNO Standards and Accountabilities</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment and quality safe patient care</li> <li>• Coordinate and promote attendance at rallies and political action events</li> <li>• Advocate for use of policy 26.11 monies to support Local political action activities</li> </ul>	<ul style="list-style-type: none"> <li>• Regional Political Action Committee Meetings</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Advocacy in Action 101</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> <li>• Violence: Be Savvy and Safe</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members with understanding the importance of political action and to develop their skills in this area</li> <li>• Liaise with other political action representatives</li> <li>• Mentor members on conducting political action campaigns, including developing/disseminating key messages for use in meetings with elected representatives</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> <li>• Executive Skills I: Leading a Local</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Member Engagement</b>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Develop a communication plan to support any political activity in their Local and/or region</li> <li>• Plan a calendar of events</li> <li>• Disseminate information to the Bargaining Unit leadership team and to members re: political action</li> <li>• Liaise with other unions and affiliates</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Build an effective relationship with Bargaining Unit leadership team</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit calendar dates, including ONA actions at a provincial, Local and bargaining unit level</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that policy 26.11 funding requests are coordinated with the Local and submitted provincially</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> </ul>

## Site Representative (Site Rep)

Bargaining Units whose workplaces have more than one site will often have Site Reps. The accountabilities and required competencies for this role are tailored to the needs of the Bargaining Unit. Bargaining Units and Locals can vary widely from one another so, in turn, the Site Rep role contains a spectrum of possible accountabilities and competencies across the Union.

### ***Site Reps whose role and function are similar to Unit Reps***

At one end of the continuum, the Site Rep plays a role similar to the Unit Rep. It is a cornerstone position of the Bargaining Unit doing grassroots leadership; the Bargaining Unit leadership team relies on the Unit Rep to be the ‘eyes and the ears’ on union matters at the unit (or in this case, site) level, ensuring any violations of the collective agreement is reported to the appropriate Bargaining Unit leadership team member. They are usually the first point of contact for ONA members when there is a concern. Site Reps who play this role are only different from a Unit Rep in that their work location is at a different site than the other locations where the members in their Bargaining Unit work. Unit reps’ worksites typically include one building location that has a number of units, each one with its own rep.

### ***Site Reps whose role and function are similar to those of the Bargaining Unit leadership Team***

On the other end of the continuum are Site Reps who assume accountabilities similar to other members of the Bargaining Unit leadership team and often play a critical role in contract administration for their particular site. Often, they are the lead representative for a large number of members on their site and may have a number of Unit Reps who relay information to them. In turn, they must also relay information to the Bargaining Unit President to keep them apprised of any issues. The Site Rep is a common position in hospital Bargaining Units that have more than one site. For Site Reps of this nature, they are elected by the members who work at their respective site as required by By-Law VIII.<sup>1</sup>

These Site Reps also have a different relationship with the Local Executive compared to Site Reps acting like Unit Reps, in that they are often voting members of the Local Executive. Again, this additional role of sitting on a Local Executive means they have similar accountabilities to the Bargaining Unit President, acting as a link to the Local Executive team and working with them to

---

<sup>1</sup> As per ONA’s Statement of Beliefs and Constitution, *An appropriate number of Unit and/or Site Representatives shall be elected by and from the members of the Unit and/or Site to represent members in specific areas or functions of their employer’s establishment.*

ensure that the Bargaining Unit has sufficient resources and information to support labour relations at the Bargaining Unit level.

***Other roles similar to Site Reps***

There are other titles in Locals and Bargaining Units that hold accountabilities and require a set of competencies similar to the Site Reps who hold responsibilities for contract administration; these titles include Site Vice-Presidents, or Vice-Presidents who hold particular portfolios. These portfolios can include handling contract administration matters for a particular area which are often those that reflect the areas of the Bargaining Unit leadership team (e.g. grievances, professional responsibility workload reporting, health and safety, etc.). It should be noted that there are some large single-site Bargaining Units who have a role titled, Site Bargaining Unit President, who work closely with the Bargaining Unit President and support contract administration. Their accountabilities are similar to Site Vice-Presidents as well.

***What does this mean for your Bargaining Unit or Local?***

The role of the Site Rep is specific to the needs of the Bargaining Unit. Whether the Site Rep has an official role on the Local Executive is a decision made at the Local level.

The best way to discern what education and support is required to support a Site Rep in your Bargaining Unit and/or Local, is to first detail the purpose and role of the Site Rep. Their duties can be compared with the positions in this Guide. Where there are similarities, the section on competencies and development opportunities can be used as a resource to build their learning plan. It is important that where Locals have Site Representative and/or Vice-President roles in their Local Executive structure, their role and accountabilities should be outlined in Local policy.

## Introduction to the Local Executive

Through teamwork, the Local executive administers the affairs of the Chartered Local Association, representing the interests of its members and the broader organization. The Local executive is accountable for their personal code of conduct, achieving their outcomes and representing the members as outlined in ONA's constitution. The Local executive is accountable for the financial stability of the Local through strategic/fiscal planning, within the framework of ONA's mandatory financial policies and ONA's constitution.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promotes ONA's strategic plan
- Build effective working relationships with the members of the Local executive and/or Bargaining Unit team, employer, Labour Relation Officer(s) and members
- Attends Bargaining Unit meetings (i.e. for each Local executive's respective Bargaining Unit)
- Is aware of yearly meetings, committee meetings and events that impact members (Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)
- Establish and adhere to the turnover process for incoming executives in accordance with ONA policy 8.2 *Records Retention and Exchange of Information*
- Provide input into the selection of an auditor
- Accept the responsibility and accountability of being a leader in the decision-making process

### **Priority: Members Informed: Empowering you with the information you value**

- Inform members about their right to vote on Local policies and budget, and support them to exercise this right by March 31 of each year

- Provide access to education for members so they know their rights under the collective agreement
- Develop and implement processes for the collection, receipt and sharing of Local and membership information, and that these processes follow ONA's privacy policy
- Foster awareness of who the Bargaining Unit leaders are and ensure their contact information is available
- Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Demonstrate leadership and serve as a coach and mentor to members
- Through a strategic planning and budgeting process, identify member needs and work towards solutions
- Ensure the following services are provided to Local members:
  - Administration of collective agreements
  - Processing of grievances
  - Education for members at the Bargaining Unit level
- Represent and resolve incidents of discrimination, racism, and harassment under the Ontario Human Rights Code
- Actively seek feedback from Local membership on the Local's functioning and leadership
- Identify and carry forward governance issues to regional and provincial levels of the organization

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Administer a strategic planning process as outlined in the constitution and the mandatory policies, which includes input from all Bargaining Units
- Adhere to election guidelines at the Local and bargaining unit levels during elections and/or the appointment of all positions
- Raise leaders' awareness about their roles and accountabilities of their position
- Liaise with regional teams and Vice-Presidents regarding Local education needs and servicing trends
- Inform executive committee members about service delivery accountabilities and this guide at the Bargaining Unit and Local level
- Ensure decisions made by the Local executive are communicated and implemented at the Bargaining Unit level

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Advocate on behalf of the members with employer associations, government decision-makers and Local stakeholders
- Support and attend Local and bargaining unit political action activities
- Ensure visibility of Local brand
- Foster awareness and ensure the use of Local 26.11 political action monies.

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

## Local Coordinator

The role of the Local Coordinator (LC) is to coordinate and facilitate the functioning of the Local within the ONA Constitution, ONA provincial and Local policies, and to ensure there is effective communication throughout the Local and with all levels of the organization. The Local Coordinator works with the Local executive team to ensure the financial stability of the Local through strategic/fiscal planning, adhering to financial policies (see Local Financial Policy Guide), ONA's Constitution and ONA's Strategic Plan. The LC acts as a resource on governance issues; they serve as the link between the broader membership and the ONA Board of Directors, through the sharing of E-Scan reports from the Bargaining Unit(s) with the Regional Vice-President and the sharing of information and reports from the Board of Directors with the membership.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Attend meetings to amplify the voices of their Local members (Area Coordinator Conferences, Provincial Coordinator Meetings, Provincial Leadership Meetings, sector meetings and the Biennial Convention)
- Build effective working relationships with the members of the Local executive and/or Bargaining Unit team, board members, and Local members
- Attend Bargaining Unit meetings (i.e. for each Local executive's respective Bargaining Unit)
- Establish and adhere to the turnover process for an incoming Local Coordinator, or a First Vice-Coordinator for coverage, in accordance with ONA Policy 8.2 *Records Retention and Exchange of Information*.
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)
  - Promoting the use of ONA email accounts to the Local executive and their respective bargaining unit representatives, where applicable
- Complete the Yearly Executive Positions Review in Access ONA in a timely manner

- Approve Local expenses in accordance with Local financial policies in a timely manner
- Act as the voting delegate for the chartered Local association at the Biennial Convention or a special meeting of the union
- Ensure processes are developed and implemented for the collection, receipt and sharing of Local and membership information
- Review Local policies re: paid time by Local for doing union business (where applicable)
- Notify Local executive when away and who to contact (i.e., First Vice-Coordinator)
- Ensure there is a process in place to turn over files to an incoming Local Coordinator
- Facilitate effective working relationships within the Local executive team

**Priority: Members Informed: Empowering you with the information you value**

- Share regional and provincial information and learnings with the Local membership
- Maintain an e-mail/contact list for Bargaining Unit Representatives
- Stay current with ONA communications and share information with relevant leaders
- Develop and implement a communication plan to share information on Local activity (i.e., using social media, website, e-mail, phone calls, voicemail, postings, newsletter, etc.)
- Provide copies of Local policies including financial policies to members
- As per the ONA Constitution, attend a minimum of one meeting of each Bargaining Unit in the Local per term of office, and additional meetings of the Bargaining Units as necessary
- In collaboration with the Local executive, establish a Local planning line for the year and assist Bargaining Unit Presidents in developing their annual Bargaining Unit planning lines, including Local executive meetings, Local and Bargaining Unit meetings
- Coordinate the review of the reports generated from ONA's provincial office to help ensure members are receiving ONA communications and that any updates are provided as required (e.g., Dues Remittance Report (DRR), Membership Information Record Excel (MIRE), Executive Listings)

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members, and foster engagement
- Seek to understand members' challenges in the Bargaining Unit and support their resolution by:

- Promoting the importance of the Local's receipt of e-scans by Bargaining Unit Presidents and providing templates currently in use by the Local
- Incorporating the information from Bargaining Unit e-scans into Local e-scan report back for the Area Coordinators Conference
- Fostering the Local executive's awareness of the bargaining and labour relations priorities in each Bargaining Unit in preparation for budget planning
- Providing opportunity for report back of Bargaining Unit issues at each Local executive meeting
- Maintain ongoing communication with the Regional Vice-President and the First Vice-Coordinator of the Local about issues, concerns or successes

### **Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Mentor and support Bargaining Unit Presidents in their roles by:
  - Directing Bargaining Unit Presidents to resources when needed regarding labour relations matters
  - Meeting with new Bargaining Unit Presidents as needed to mentor and assist with questions
  - Sharing knowledge of ONA's strategic plan
  - Referencing the service delivery accountabilities and this guide to raise awareness about roles and accountabilities of Bargaining Unit representatives, including the Bargaining Unit President
  - Acting as a resource to resolve conflicts and complaints between the Bargaining Unit President and membership
  - As per the ONA Constitution, attending a minimum of one meeting of each Bargaining Unit in the Local per term of office, and additional meetings of the Bargaining Units as necessary
  - Ensuring all Bargaining Units within the Local have input into the strategic planning process, including education for their members
  - Providing the list of current Local executive members
- Ensure that all Bargaining Units are effectively supported by:
  - Following the ONA constitution and polices, including when setting meetings, elections, etc., and ensuring these dates are communicated to the Local executive, membership and Regional Vice-President
  - Implementing processes that actively seek feedback from Bargaining Units to help inform the Local's decision-making
  - Providing the education template to the executive so priority education needs are identified in preparation for the budget meeting
  - Using the ONA regional board member as a resource to clarify questions

- Ensuring their own comprehensive understanding of ONA's constitution
  - Promoting on-going education and other supports to each member of the Local executive (i.e. Local Coordinator, First Vice-Coordinator, Secretary, Treasurer and Bargaining Unit Presidents) to help ensure they have the required competencies, including knowledge, skills and abilities, to fulfill the duties and/or role as assigned
  - Reviewing the accountabilities and duties of each Local executive member
  - Establishing processes to ensure interactive communication between the Local Coordinator and Local executive on Local activity
  - In collaboration with the Local executive at the Local executive meetings, reviewing and discussing the monthly financial package received
- Ensure elections are held in accordance with the ONA constitution and the Local and bargaining unit election policy at the Local and bargaining unit levels

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Leverage policy 26.11 to support Local and bargaining unit actions
- Promote and support member participation in regional, Local and bargaining unit actions
- Ensure visibility of the Local brand
- At the request of the Provincial President, speak to the media

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Deliver and/or appoint the land acknowledgement at the start of every Local executive and Local membership meeting
- Encourage and recommend attendance at the human rights and equity caucus
- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan
- Raise awareness among the Local executive about ONA's strategic plan and ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial and Local policies, including mandatory financial policies and ONA Policy 26.11 <i>Funding for Community Activism and Local Political Action</i></li> <li>• Rules of order for Local meetings</li> <li>• ONA provincial campaigns</li> <li>• Approval of expenses as per Local policy</li> </ul>	<ul style="list-style-type: none"> <li>• Unionism 101- The History, The Impact, The Power</li> <li>• Becoming an ONA Unit Representative: A Beginner’s Guide</li> <li>• New Executive Partnership Workshop: Local Coordinators and Local Treasurers</li> <li>• New Executive Partnership Workshop: New Local Coordinator</li> <li>• Yearly Leadership Meetings</li> <li>• Conducting Effective Meetings</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> <li>• Executive Skills I: Leading a Local</li> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<p><b>Contract Administration</b></p> <ul style="list-style-type: none"> <li>• Knowledge and interpretation of ONA service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Hospital Central Contract Interpretation Workshop</li> <li>• Homes Central Contract Interpretation Workshop</li> <li>• The Grievance Process</li> <li>• The Power of the Occupational Health and Safety Act, ONA and You</li> <li>• Facing Professional Practice Concerns</li> <li>• College of Nurses (CNO) Standards and Accountabilities</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Visionary</b></p> <ul style="list-style-type: none"> <li>• Communicate the “big” picture</li> <li>• Think strategically, problem solve and move Local activities forward</li> </ul>	<ul style="list-style-type: none"> <li>• Area Coordinators Conference</li> <li>• Provincial Coordinator Meetings</li> <li>• Provincial Leadership Meeting</li> <li>• Leadership Summit</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment and quality safe patient care</li> <li>• Coordinate, promote and attend rallies and political action events</li> <li>• Advocate for policy 26.11 monies to support Local political action activities</li> <li>• Advocate for membership needs at the Local executive (e.g., education, budget needs)</li> <li>• Act as the voting delegate for the chartered Local association at the Biennial Convention or a special meeting of the union</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Advocacy, Proficiency and Professionalism</li> <li>• H&amp;S: What you need to know 1</li> <li>• Basic Introduction to Human Rights</li> <li>• eLearning: ONA's Anti-Racism and Anti-Oppression (ARAO) Education Series</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members their union work</li> <li>• Liaise with other members of the Local executive and support them in their roles</li> <li>• In collaboration with the Local executive, develop a succession plan</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Manage the Local Coordinator e-mail account</li> <li>• Share information from provincial meetings</li> <li>• Share information approved by the Local executive to the membership (e.g., newsletters, e-mail blasts, union meetings, Local website)</li> <li>• Respond to Local executive issues in a thoughtful and timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process -Lecturette</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Facilitate effective relationships with the Local executive, supporting resolution of conflict when needed</li> <li>• Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members and foster engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process -Lecturette</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• eLearning: Demystifying Microaggressions and Decolonizing our Language</li> <li>• Provincial Leadership Meeting</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit calendar dates, including ONA actions at a provincial, Local and bargaining unit level</li> <li>• Awareness of key provincial and Local calendar dates</li> <li>• Plan and schedule Local meetings (executive and membership)</li> <li>• Attend regional and provincial meetings</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that policy 26.11 funding requests are coordinated with the Local and submitted provincially</li> <li>• Maintain Local records</li> <li>• Ensure there is a process to circulate and sign meeting minutes and a copy is saved for the audit</li> <li>• Maintain and update the MIRE in conjunction with the Local executive and remind Bargaining Unit Presidents to register members</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> </ul>

## First Vice-Coordinator

The First Vice-Coordinator helps ensure effective communication throughout the Local and all levels of the organization and works with the Local executive team to ensure the financial stability of the Local through strategic/fiscal planning, adhering to financial policies (see Local financial policy guide), ONA's constitution and ONA's strategic plan. The First Vice-Coordinator must ensure that they understand the accountabilities of the Local Coordinator role because they act in that role in the Local Coordinator's absence, including being a resource on governance issues.

In multi-unit Bargaining Unit Locals, the First Vice-Coordinator is a Bargaining Unit President elected by the of the Local executive team. The Vice-Coordinator has all the accountabilities of their Bargaining Unit President role in addition to working in collaboration with the Local Coordinator and executive to coordinate and facilitate the functioning of the Local within the constitution and ONA policies.

In single bargaining unit Locals, the First Vice-Coordinator is elected from the Bargaining Unit membership.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Build effective working relationships with the members of the Local executive and/or Bargaining Unit team, Board members, and members
- Attend Bargaining Unit meetings
- Is aware of yearly meetings, committee meetings and events that impact members (Bargaining Unit, labour-management, grievance meetings, Local meetings, Area Coordinator Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Attend Bargaining Unit meetings (i.e. for each Local executive's respective Bargaining Unit)
- Establish and adhere to the turnover process for an incoming First Vice-Coordinator in accordance with ONA Policy 8.2 *Records Retention and Exchange of Information*
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)

- Promoting the use of the ONA email account for the executive and their bargaining unit representatives, where applicable

**Priority: Members Informed: Empowering you with the information you value**

- Support processes designed to help ensure members are receiving communications from ONA including:
  - Supporting the coordination to review the reports generated from ONA's provincial office, by distributing the MIRE, executive booklet, DRR at executive meetings and providing updates as required
  - Supporting Bargaining Unit Presidents to understand their accountability to review the monthly DRR for accuracy and inform the Treasurer and Local Coordinator of any errors
  - In January, supporting the executive to review information in the executive booklet and process any changes (i.e. sending ONA updates, including when there are no changes)
  - Ensuring processes are developed and implemented for the collection, receipt and sharing of Local and membership information, and that these processes are following ONA's privacy policy
- Stay current with ONA communications, including e-mail, voicemail, and regular mail, and share the information with appropriate leaders
- Notify the Local executive who to contact in their absence
- Provide a list of current Local executive members to the Local membership
- Develop e-mail/contact lists for Bargaining Unit representatives
- Support the Local executives' understanding of the processes in place for the effective distribution of information throughout the organization, Locally and provincially

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members, and foster engagement
- Seek to understand members' challenges at the Bargaining Unit and supports their resolution by:
  - Ensuring all Bargaining Units within the Local have input into the strategic planning process, including education for their members
  - Promoting the importance of the Local's receipt of e-scans by Bargaining Unit President and providing templates currently in use by the Local
  - Fostering the Local executive team's awareness of the bargaining and labour relations priorities in each Bargaining Unit in preparation for budget planning

- Providing opportunity to report Bargaining Unit issues at each Local executive meeting
- In collaboration with the Local executive, establish a Local planning line for the year

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Ensure that all Bargaining Units are effectively supported by the Local by:
  - Ensuring ONA's constitution and polices are followed/enacted, including when setting meetings, elections, etc., and ensuring these dates are communicated to the Local executive, membership and Regional Vice-President
  - Reviewing the budget actuals and Local activity against the budget at Local executive meetings, with the Local executive
- Support effective functioning of the Local executive to ensure Bargaining Unit needs are addressed by:
  - Supporting processes to ensure interactive communication between the Local Coordinator and Local executive on Local activities
  - Coaching and mentoring the Secretary and Treasurer in their roles as needed in conjunction with the Local Coordinator
  - Continuously assessing learning needs of executives to meet their additional accountabilities in conjunction with the Local Coordinator
  - Notifying the Local Coordinator when they are not available for an assignment
  - Facilitating effective working relationships within the Local executive Team
- Act as Local Coordinator in their absence to fulfill their accountabilities, including:
  - Coaching and mentoring
  - Carrying out communications activities
  - Attending meetings to amplify the voices of their Local members (Area Coordinators Conferences, Provincial Coordinator Meetings, Provincial Leadership Meetings, sector meetings and the Biennial Convention)
  - Providing the education template to Bargaining Unit Presidents
  - Providing the e-scan to the Area Coordinators Conference chair
  - Accessing the Regional VP as needed for support
- Mentor and support Bargaining Unit Presidents in their roles by:
  - Directing Bargaining Unit Presidents to resources when needed regarding labour relations matters
  - Meeting with new Bargaining Unit Presidents as needed to mentor and assist with questions

- Assisting Bargaining Unit Presidents to develop their annual Bargaining Unit planning lines, including Local executive meetings, Local and Bargaining Unit meetings
- Sharing knowledge of ONA's strategic plan
- Referencing the service delivery accountabilities and this guide to raise awareness about roles and accountabilities of Bargaining Unit representatives, including the Bargaining Unit President
- Acting as a resource to resolve conflicts and complaints between the Bargaining Unit President and membership
- Support the Local and Bargaining Units to conduct elections in accordance with ONA's constitution and the Local and Bargaining Unit election policy

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Promote and support member participation in regional, Local and bargaining unit actions
- Support visibility of Local brand
- Foster awareness and ensures the use of Local policy 26.11 political action monies

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan
- Raise awareness among the Local executive about ONA's strategic plan and ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial and Local policies, including mandatory financial policies and ONA Policy 26.11 <i>Funding for Community Activism and Local Political Action</i></li> <li>• Rules of order for Local meetings</li> <li>• ONA provincial campaigns</li> </ul>	<ul style="list-style-type: none"> <li>• Unionism 101- The History, The Impact, The Power</li> <li>• Becoming an ONA Unit Representative: A Beginner’s Guide</li> <li>• New Executive Partnership Workshop: Local Coordinators and Local Treasurers</li> <li>• New Executive Partnership Workshop: New Local Coordinator</li> <li>• Yearly Leadership Meetings</li> <li>• Conducting Effective Meetings</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> <li>• Executive Skills I: Leading a Local</li> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<p><b>Contract Administration</b></p> <ul style="list-style-type: none"> <li>• Know and interpret ONA service delivery accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Hospital Central Contract Interpretation Workshop</li> <li>• Homes Central Contract Interpretation Workshop</li> <li>• The Grievance Process</li> <li>• The Power of the Occupational Health and Safety Act, ONA and You</li> <li>• Facing Professional Practice Concerns</li> <li>• College of Nurses (CNO) Standards and Accountabilities</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Visionary</b></p> <ul style="list-style-type: none"> <li>• Communicate the “big” picture</li> <li>• Think strategically, problem solve and move Local activities forward</li> </ul>	<ul style="list-style-type: none"> <li>• Area Coordinators Conference</li> <li>• Provincial Coordinator Meetings</li> <li>• Provincial Leadership Meetings</li> <li>• Leadership Summit</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, a quality practice environment and quality safe patient care</li> <li>• Coordinate, promote and attend rallies and political action events</li> <li>• Advocate for policy 26.11 monies to support Local political action activities</li> <li>• Advocate for membership needs at the Local executive (e.g., education, budget needs)</li> <li>• Act as the alternate voting delegate at the Biennial Convention or a special meeting of the union</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Grievance Process</li> <li>• Advocacy, Proficiency and Professionalism</li> <li>• H&amp;S: What you need to know 1</li> <li>• Basic Introduction to Human Rights</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members in their union work</li> <li>• Liaise with other members of the Local executive and supports them in their roles</li> <li>• In collaboration with the Local executive team, develops a succession plan for the Local</li> </ul>	<ul style="list-style-type: none"> <li>• Resolving Conflict</li> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> </ul>
<p><b>Competency: Member Engagement</b></p>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Manage the Local Coordinator e-mail account in the absence of the Local Coordinator</li> <li>• Share information from provincial meetings</li> <li>• Distribute information at the direction of the Local executive to the Local membership (e.g., newsletters, e-mail blasts, union meetings, Local website)</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process - Lecturette</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Facilitate effective relationships with the Local executive, supporting resolution of conflict when needed</li> <li>• Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members, and fosters engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Responsibility Workload Reporting Process - Lecturette</li> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• eLearning: Demystifying Microaggressions and Decolonizing our Language</li> <li>• Provincial Leadership Meeting</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit calendar dates, including ONA actions at a provincial, Local and bargaining unit level</li> <li>• Awareness of key provincial and Local calendar dates</li> <li>• Plan and schedule Local executive and Local meetings</li> <li>• Attend regional and provincial meetings as needed</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Ensure that policy 26.11 funding requests are coordinated with the Local and submitted provincially</li> <li>• Maintain Local records</li> <li>• Support the maintenance of the MIRE in conjunction with the Local executive and remind Bargaining Unit Presidents to register members</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> </ul>

## Treasurer

The Treasurer works with the Local executive team to ensure the financial stability of the Local through strategic/fiscal planning, adhering to financial policies (see Local financial policy guide), ONA's constitution and ONA's strategic plan.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Understand and promote ONA's strategic plan
- Is aware of yearly meetings, committee meetings, and events that impact members by referencing the Local and Bargaining Unit planning line, (Bargaining Unit, labour-management, grievance meetings, etc.; Local meetings, Area Coordinators Conferences, Provincial Coordinator Meetings, Biennial Convention, etc.)
- Attend Bargaining Unit meetings (i.e. for their respective Bargaining Unit)
- Build effective working relationships with the Local executive
- Establish and adhere to the turnover process for the incoming Treasurer in accordance with ONA policy 8.2 *Records Retention and Exchange of Information*
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)
  - Promoting the use of the ONA email account for the executive and their bargaining unit representatives, where applicable
- Ensure timely processing of expenses as per Local policy
- Attend treasurer workshop and identifies additional education needs to fulfill their role

### **Priority: Members Informed: Empowering you with the information you value**

- Support members' access ONA resources (e.g. guides, workshops, tip sheets, etc.).
- Foster awareness of who the Local leaders are and ensures their contact information is available
- Ensure members are aware of the Local budget and policies by:
  - Reviewing all Local policies annually at a Local membership meeting

- Informing members of the rationale for new and/or revised policies, including recommendations by the auditor
- Inform members of their right to vote annually on the Local budget, financial policies and other policies by March 31 of every calendar year and supports this process by ensuring for the scheduling of meeting of the chartered Local association for the express purpose of getting Local membership approval
- Communicate financial information throughout the Local, and provincially, when necessary (e.g., at executive and Local meetings, and per the Local financial policy guide)

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Raise awareness about Local and Bargaining Unit leadership opportunities among grassroots members, and foster engagement
- Seek to understand members' challenges at the Bargaining Unit level and supports their resolution by:
  - Communicating with Local Coordinator and Bargaining Unit Presidents on a regular basis to determine evolving Bargaining Unit needs and incorporating those changes into the Local's strategic/fiscal plan
  - Being aware of, understanding and using the Local financial policy guide as a resource to ensure the Local and Bargaining Units are accessing all available opportunities for which they are eligible
- Ensure there are up-to-date membership-approved Local financial policies regarding Local expenditures
- Ensure the appropriate benefits are deducted when paying salary by reviewing the appropriate collective agreement and consulting with the Labour Relations Officer to confirm which benefits should be billed for by the employer

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Build capacity with the Local executive to effectively support Bargaining Units by:
  - Educating the Local executive members on their fiduciary accountabilities
  - Helping the Local executive team review and understand the Local financial budget and Local financial reports
  - Assisting the Local executive to develop/revise policy as required
  - Engaging in ongoing dialogue with Local executive team regarding impact of Local's work on approved budget
  - Ensuring ONA's constitution and policies are adhered to when doing strategic/fiscal planning

- Providing the Local Coordinator and Local executive team with the monthly financial documents for the Local to review and assess the need for supplemental funding
  - Involving the entire Local executive in developing and finalizing the budget
- Follow processes designed to help the Local executive meet their fiduciary accountabilities by:
  - Collaborating with the Local executive team to set meeting dates/books closing (e.g., date final expenses are due)
  - Developing with the Local executive, the role and expectations for the bookkeeper (where necessary), liaising with the bookkeeper to develop a good working relationship and ensure their responsibilities are being met
  - Establishing and following a process for saving hard copy and/or electronic documentation for ease of document retrieval, to ensure files are backed up and naming conventions are standardized
  - Working with Local executive to develop a process to hiring a bookkeeper (after consultation with the Provincial Treasurer) where necessary
  - Liaising with the Local auditor and the audit committee, and ensuring they receives copies of Local minutes that include approval of expenditures and locally approved policies
  - Connecting with the Provincial Treasurer as required and contacting Simply Help Desk for assistance as needed
  - Sending signed, approved minutes from Secretary to auditor
  - Using the template documents and computer software provided by ONA
  - In collaboration with the Local executive team, determining the auditor and document in the minutes
- Ensure Local financial records are kept up-to-date and complete, including:
  - Keeping one official hard copy of the monthly report as per ONA policy (see the work manual for the bookkeeping platform – month end and year end checklist)
  - Minuting executive approval by motion to appoint auditor
  - Maintaining a December 31 year-end for financial records to ensure consistency in financial reporting
  - Sending signed audited statements to ONA in accordance with the policy following the meeting with Local Coordinator and auditor at year-end
  - Entering adjustments from auditor and sending backup file to ONA
  - Checking DRR monthly
  - Maintaining data electronically in backup files as per ONA policy
- Support Bargaining Unit Presidents to support their members by:

- Reviewing Bargaining Unit needs presented at budget prep meeting to determine Local financial priorities
- Liaising with employer/ONA finance staff regarding dues amounts and Local dues levy (reviewing incoming monies for accuracy, determining any gaps and discussing with ONA finance staff)
- Liaising with Bargaining Unit Presidents to ensure a monthly review of DRR and providing monthly updates as needed to dues/membership
- Ensuring the ONA Financial Specialist is informed in writing annually of any special dues levy established and approved by membership
- Help ensure collective agreement rights are protected by:
  - Tracking copies of all negotiated collective agreements
  - Reviewing the benefits analysis list from the Regional Manager after each round of bargaining or when the collective agreement renewed
  - Ensuring respective employers are informed annually of any special dues levy established and approved by membership, and the benefits that should be billed for by the employer

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Promote and support member participation in regional, Local and bargaining unit actions
- Support visibility of Local brand
- Foster awareness and ensure the use of Local policy 26.11 political action monies

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan
- Raise awareness among the Local executive about ONA's strategic plan and ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b> Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial and Local policies, including mandatory financial policies</li> </ul>	<ul style="list-style-type: none"> <li>• Unionism 101- The History, The Impact, The Power</li> <li>• Becoming an ONA Unit Representative: A Beginner’s Guide</li> <li>• New Executive Partnership Workshop: Local Coordinators and Local Treasurers</li> <li>• New Executive Partnership Workshop: New Treasurer</li> <li>• Yearly Leadership Meetings</li> <li>• Executive Skills I: Leading a Local</li> <li>• Executive Skills II: Leadership Moving Forward</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> <li>• Ensure processing of Local expenses as per Local policy</li> </ul>	<ul style="list-style-type: none"> <li>• Yearly Leadership Meetings</li> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, for a quality practice environment and quality safe patient care</li> <li>• Coordinate, promote and attend rallies and political action events</li> <li>• Advocate for membership needs at the Local executive (e.g., education, budget needs)</li> <li>• Collaborate with the Local executive in developing a succession plan for Local executive roles</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Basic Introduction to Human Rights</li> <li>• Conducting Effective Meetings</li> <li>• Resolving Conflict</li> </ul>

<b>Competencies and Accountabilities</b>	<b>Competency/Skill Development Opportunities</b>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members in their union work</li> <li>• Liaise with other members of the Local executive and support them in their roles</li> <li>• Identify educational opportunities to help others grow and succeed</li> <li>• Educate the Local executive on their fiduciary accountabilities</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> </ul>
<b>Competency: Member Engagement</b>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Share information from provincial meetings</li> <li>• Distribute information at the direction of the Local executive to the Local membership (e.g., newsletters, e-mail blasts, union meetings, Local website)</li> <li>• Respond to Local executive issues in a thoughtful and timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: ONA's Anti-Racism and Anti-Oppression (ARAO) Education Series</li> </ul>
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Facilitate effective relationships with the Local executive, supporting resolution of conflict when needed</li> <li>• Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members, and foster engagement</li> <li>• Build effective relationships the Local bookkeeper, as applicable</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• Provincial Leadership Meeting</li> </ul>
<b>Competency: Governance</b>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit calendar dates, including ONA actions at a provincial, Local and bargaining unit level</li> <li>• Awareness of key provincial and Local calendar dates</li> <li>• Plan and schedule Local executive and Local meetings</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and circulate monthly financial reports</li> <li>• Maintain and update the MIRE in conjunction with the Local executive and remind Bargaining Unit Presidents to register members</li> <li>• Review and identify gaps in the DRR and notify the Bargaining Unit Presidents for follow-up</li> <li>• Develop budget documents</li> <li>• Maintain data in Filr back-up</li> <li>• Maintain financial records in compliance with ONA’s financial policies</li> <li>• In conjunction with the audit committee, meet with the auditor to review audited financial statements</li> <li>• Present audited financial statements to the Local executive committee</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> </ul>

## Secretary

The Secretary, through collaboration with other members of the Local executive team, maintains accurate records, manages correspondence for the Local and works to ensure the financial stability of the Local through strategic/fiscal planning and adhering to financial policies (see Local financial policy guide), ONA's constitution and ONA's strategic plan.

### **Mission, Vision and Values (Strength and Unity, Integrity and Professionalism, Diversity, Equity and Inclusion)**

- Act in alignment with ONA's values
- Ensure confidentiality is maintained of members' information, including personal health information, in accordance with ONA policy (keeping files in a secure locked location)
- Build effective working relationships with the members of the Local executive team
- Establish and adhere to the turnover process for an incoming Secretary in accordance with ONA Policy 8.2 *Records Retention and Exchange of Information*
- Ensure members' information is kept confidential, including their personal health information, by:
  - Storing information – both digital and electronic records - in accordance with ONA policy (e.g. keeping files in a secure locked location using ONA e-mail and accounts only)
  - Creating and providing access to folders/files as needed and as appropriate
  - Using the ONA e-mail account only for bargaining unit work (i.e. not using employer e-mail)
  - Promoting the use of ONA email accounts to members of the Local executives and their respective bargaining unit representatives, where applicable
- Support the processes developed to collect and share Local and membership information

### **Priority: Members Informed: Empowering you with the information you value**

- Foster awareness of who the Local leaders are and ensures their contact information is available
- Support the Local executive and the Bargaining Unit Presidents to keep their members informed by:
  - Supporting the Bargaining Unit President to create Bargaining Unit membership personal email listings

- Supporting Bargaining Unit Presidents to update membership information and Bargaining Unit leadership team information and promoting the use of the appropriate forms to do this on an ongoing basis
- Updating and maintaining MIRE in collaboration with the Local executive team and Bargaining Unit representatives
- Maintaining the DRR, MIRE and carries out other duties as per Local policy, in collaboration with Treasurer
- Ensure members are informed about the benefits of ONA and member entitlements by:
  - Supporting Bargaining Unit Presidents to sign up new members on an ongoing basis
  - Receiving new membership forms from the Bargaining Unit Presidents and ensuring that they are filed with ONA and records maintained Locally
- Support members to access ONA resources (i.e. guides, workshops, tip sheets, etc.)
- Foster awareness of who the Local leaders are, and their contact information is available and ensure that processes are in place for the collection and storage of Local membership information
- Work in collaboration with the Local Coordinator on correspondence and communication to and from the Bargaining Units, Local and the ONA provincial
- Ensure all information pertaining to Local activity is recorded, maintained and accessible as needed, as per ONA's constitution

**Priority: Members Supported: Supporting you to achieve better work conditions**

- Raise awareness of Local and Bargaining Unit Leadership opportunities among grassroots members, and foster engagement
- Seek to understand members' challenges at the Bargaining Unit and supports their resolution by:
  - Promoting the importance of the Locals receipt of e-scans by Bargaining Unit President and providing templates currently in use by the Local
  - Soliciting agenda items from the Local executive team
  - Providing opportunity to report Bargaining Unit issues at each Local executive meeting
- Follow ONA's constitution and policies

**Priority: Stronger Bargaining Units: Equipping your Bargaining Unit Representatives to support you and work with you**

- Build capacity with the Local executive to effectively support Bargaining Units by:

- Ensuring that bookings and registrations for Provincial Coordinators Meetings and other conferences/meetings are booked and approved by the Local executive in accordance with Local practice/policy
- Planning, setting and distributing meeting agendas and notices as per constitution, in collaboration with the Local Coordinator
- Sending minutes out to the Local executive team for review at next Local executive meeting
- Assisting the Local executive in developing/revising policy as required
- Recording and maintaining records of all meeting minutes, ensuring that minutes include:
  - The agenda and attendees, topics, discussion, outcomes/motions
  - The Treasurer's report with present balances and any issues arising
  - Educational needs and education plans
  - Any special dues levies
- Follow processes designed to help the Local executive meet their fiduciary accountabilities by:
  - Ensuring the Local auditor receives the approved copies of Local minutes, signed by the Local Coordinator and Secretary, including Local approval for expenditures and locally approved policies
  - Establishing and following a process for saving hard copy and/or electronic documentation for ease of document retrieval, to ensure files are backed up and naming conventions are standardized
- Identify educational needs to support secretarial duties for the Local

**Priority: Telling Ontarians the Truth: Sharing what you know about the state of the health care system**

- Support and attend Local and Bargaining Unit political action activities
- Promote and support member participation in regional, Local and bargaining unit actions
- Ensure visibility of Local brand
- Foster awareness and ensure the use of Local political action monies

**Priority: Everyone Included: Creating a more diverse, equitable, and inclusive union**

- Ensure all issues have a human rights and equity lens applied, being cognizant of the challenges faced by members of equity groups and our obligations under the Ontario Human Rights Code
- Continuously work towards acquiring knowledge of anti-racism and anti-oppression approaches (ARAO) and promotes ONA's ARAO action plan

- Raise awareness among the Local executive about ONA's strategic plan and ONA's ARAO action plan

Competencies and Accountabilities	Competency/Skill Development Opportunities
<b>Competency: Knowledge</b>	
<p><b>ONA</b>                      Knowledge of:</p> <ul style="list-style-type: none"> <li>• ONA’s constitution and statement of Beliefs</li> <li>• ONA’s strategic plan</li> <li>• ONA provincial and Local policies, including mandatory financial policies</li> <li>• Rules of order for Local meetings</li> <li>• ONA provincial campaigns</li> </ul>	<ul style="list-style-type: none"> <li>• Unionism 101- The History, The Impact, The Power</li> <li>• Becoming an ONA Unit Representative: A Beginner’s Guide</li> <li>• Secretaries Workshop</li> <li>• Yearly Leadership Meetings</li> <li>• Executive Skills I: Leading a Local</li> </ul>
<b>Competency: Leadership</b>	
<p><b>Confidentiality</b></p> <ul style="list-style-type: none"> <li>• Act in alignment with ONA’s values</li> <li>• Maintain confidentiality and privacy of membership information</li> </ul>	<ul style="list-style-type: none"> <li>• Yearly Leadership Meetings</li> <li>• Privacy and Confidentiality</li> <li>• It’s More Than Social Media</li> </ul>
<p><b>Advocacy</b></p> <ul style="list-style-type: none"> <li>• Advocate for membership, for a quality practice environment and quality safe patient care</li> <li>• Coordinate, promote and attend rallies and political action events</li> <li>• Advocate for policy 26.11 monies to support Local political action activities</li> <li>• Advocate for membership needs at the Local executive (e.g., education, budget needs)</li> </ul>	<ul style="list-style-type: none"> <li>• Advocacy in Action 101</li> <li>• Conducting Effective Meetings</li> <li>• Stronger Bargaining Units: Strength Through Intergenerational Solidarity</li> <li>• Basic Introduction to Human Rights</li> <li>• Resolving Conflict</li> </ul>
<p><b>Mentor/Coaching</b></p> <ul style="list-style-type: none"> <li>• Identify educational opportunities to assist members in their union work</li> <li>• Liaise with other members of the Local executive and supports them in their roles</li> </ul>	<ul style="list-style-type: none"> <li>• The Mentoring Toolkit</li> <li>• The Workshop Calendar</li> <li>• The Education Brochure</li> <li>• Leadership Summit</li> </ul>
<b>Competency: Member Engagement</b>	
<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>• Manage the Local Coordinator e-mail account in the absence of the Local Coordinator</li> <li>• Share information from provincial meetings</li> <li>• Distribute information at the direction of the Local executive to the Local membership (e.g., newsletters, e-mail blasts, union meetings, Local website)</li> <li>• Respond to Local executive issues in a thoughtful and timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• Conducting Effective Meetings</li> <li>• eLearning: ONA’s Anti-Racism and Anti-Oppression (ARAO) Education Series</li> </ul>

Competencies and Accountabilities	Competency/Skill Development Opportunities
<p><b>Interpersonal Relationships</b></p> <ul style="list-style-type: none"> <li>• Facilitate effective relationships with the Local executive, supporting resolution of conflict when needed</li> <li>• Raise awareness of Local and Bargaining Unit leadership opportunities among grassroots members, and foster engagement</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning: Beyond Good Intentions: Understanding Anti-Racism and Anti-Oppression</li> <li>• Executive Skills II: Leadership Moving Forward</li> <li>• Provincial Leadership Meeting</li> </ul>
<p><b>Competency: Governance</b></p>	
<p><b>Attendance</b></p> <ul style="list-style-type: none"> <li>• Awareness of key Local and Bargaining Unit calendar dates, including ONA actions at a provincial, Local and bargaining unit level</li> <li>• Awareness of key provincial and Local calendar dates</li> <li>• Plan and schedule Local executive and Local meetings</li> </ul>	<ul style="list-style-type: none"> <li>• ONA Workshop and Events Calendar</li> </ul>
<p><b>File Management</b></p> <ul style="list-style-type: none"> <li>• Maintain and circulate the minutes of meetings and ensure that minutes are signed</li> <li>• Maintain and update the MIRE in conjunction with the Local executive and reminds Bargaining Unit Presidents to register members</li> <li>• Review and identify gaps in the DRR and notify the Treasurer</li> <li>• Maintain a record of personal membership contact information</li> <li>• Act as a resource to members in updating their personal information on the ONA website</li> <li>• Maintains Local records</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Teams for Local Leadership</li> <li>• Local Executive Training: The Importance of the MIRE, Entitlements and Digital Engagement</li> </ul>

## Resources To Support ONA Leaders

ONA has several resources available to support Bargaining Unit and Local leaders. Below is a list of those resources, organized into three categories.

- Resources to support all Bargaining Unit and Local leaders
- Resources specific to support Bargaining Unit representatives
- Resources specific to support Local executive representatives

These resources are available on ONA's website and/or Access ONA. If you need any assistance locating a document, contact your Bargaining Unit President, Local Coordinator or Regional Vice-President.

### Resources to Support All Bargaining Unit and Local Leaders

- ONA Statement of Beliefs and Constitution
- ONA's Strategic Plan 2021-2026
- 2022-2026 ONA's Anti-Racism and Anti-Oppression action plan
- ONA Policy Manual, including service delivery accountabilities
- ONA Provincial Election Policy
- Fight Local: Your Guide to Local Action
- ONA Education Brochure
- 2024 Learning Pathways
- Rules of Conduct for ONA Provincial Meetings and Education
- ONA's community and group engagement guidelines
- The Mentor Toolkit
- Minutes, Motions and Meticulous Meetings Toolkit
- Nursing Week planning guide
- Government submissions
- ONA's position statements
- Collective agreements: [www.ona.org/contracts](http://www.ona.org/contracts)

### Resources Specific to Support Bargaining Unit Representatives

- ONA provincial/group negotiating teams election guidelines

#### ONA Guides

- Guide to Labour-Management Committees
- Human Rights and Equity: A Guide for ONA Members
- Guide to the Grievance Committee
- ONA Representative: A Quick Reference Guide
- Workplace Safety and Insurance Board (WSIB): A Guide for ONA Members
- Occupational Health and Safety Guide
- My Right to Refuse Unsafe Work: A Guide for ONA Members
- Workplace Violence and Harassment: A Guide for ONA Members

- ONA's Guide to Fatality, Critical Injury, Illness, Accident and Exposure
- Legal Expense Assistance Plan (LEAP): A Guide for ONA Members
- Professional Responsibility and Workload Process: A Guide for ONA Members
- Strike & Job Action Manual for ONA Leaders and Job Action Committee Members
- Managing disruptive physical behaviour
- Accommodation and Return to work: A Guide for ONA Leaders
- Attendance Management Programs: A Guide for ONA Leaders
- Disruptive physicians guide
- Public Sector Labour Relations Transition Act Guide
- Whistle Blower Protection: A Guide for ONA Members

#### **Tools and Resources**

- Hospital contract interpretation manual for leaders
- Nursing homes contract Interpretation manual for leaders
- Gathering the Facts Document (Health and Safety)
- ARAO Advocacy 101 Digital Toolkit
- Sample Professional Responsibility Workload Report Forms (including various sectors)
- The WSIB Self-Help Toolkit

#### **Resources**

- ONA workshop and events calendar

**Tip Sheets** are also available under the various services on the ONA website and/or in Access ONA.

#### **Resources Specific to Support Local Executive Representatives**

- Local and Bargaining Unit election policy
- Local financial policy guide
- Sage 40 Manual (Bargaining Unit – Employee Reimbursement Charts)

## Acronyms Commonly Used at ONA

Acronym	Meaning
ACC	Area Coordinators Conference
ACCTST	Finance and Accounting Services Team
ACNP	Acute Care Nurse Practitioners
ADMST	Administrative Services Team
AODA	<i>Accessibility for Ontarians with Disabilities Act</i>
ARAO	Anti-Racism and Anti-Oppression
ARAT	Anti-Racism Advisory Team
BATNA	Best Alternative to a Negotiated Agreement
BCNU	British Columbia Nurses' Union
BOD	Board of Directors
BSO	Behavioural Supports Ontario
BU	Bargaining Unit
BUP	Bargaining Unit President
CALM	Canadian Association of Labour Media
CCRT	Critical Care Response Team
CCPA	Canadian Centre for Policy Alternatives
CEO	Chief Executive Officer
CFNU	Canadian Federation of Nurses Unions
CHA	<i>Canada Health Act</i>
CHC	Canadian Health Coalition
CHT	Community Health Team
CHEPA	Centre for Health Economics and Policy Analysis
CHRIS	Client Health and Related Information System
CIHI	Canadian Institute for Health Information
CLC	Canadian Labour Congress
CNA	Canadian Nurses Association
CNE	Chief Nursing Executive
CNF	Canadian Nurses Foundation
CNO	College of Nurses of Ontario

<b>Acronym</b>	<b>Meaning</b>
CNS	Clinical Nurse Specialist
CNSA	Canadian Nursing Students' Association
CPP	Canada Pension Plan
CRA	Canada Revenue Agency
CROSH	Centre for Research in Occupational Safety and Health
CSRRDS	Classification Scheme and Records Retention Destruction Schedule
CUPE	Canadian Union of Public Employees
DB	Defined benefit (pension plan)
DC	Defined contribution (pension plan)
DDC	Double Duty Caregiver
DHC	District Health Council
DLC	District Labour Council
DMST	Dues and Membership Services Team
DRR	Dues remittance reports
ED	Emergency department
EHT	Employee Health Tax
EI	Employment Insurance
ER	Emergency room
ESA	<i>Employment Standards Act</i>
FAC	Fiscal Advisory Committee
FHT	Family Health Team
FIQ	Fédération interprofessionnelle de la santé du Québec
FPA	Financial planning and analysis
FT	Full time
FTE	Full-time equivalent
GNU	Global Nurses United
HAC	Hospital Association Committee
HBAM	Health based allocation model
HCCSS	Home and Community Care Support Services
HCPNW	Health Care Providers Network
HLDA	<i>Hospital Labour Disputes Arbitration Act</i>

<b>Acronym</b>	<b>Meaning</b>
HOBIC	Health Outcomes for Better Information and Care
HPARB	Health Professions Appeal & Review Board
HPNT	Hospital Provincial Negotiating Team
HOOPP	Healthcare of Ontario Pension Plan
HR	Human resources
HRAP	Human Resource Adjustment Plans
HRE	Human rights and equity
HRT0	Human Rights Tribunal of Ontario
H&S	Health and safety
HSN	Health and Safety Network
HSSO	Health Shared Services Ontario
IAC	Independent Assessment Committee
ICES	Institute for Clinical Evaluative Sciences
ICN	International Council of Nurses
ICRC	Inquiries, Complaints, & Reports Committee
ICU	Intensive care unit
ISC	Individual special circumstances
IT	Information Technology
IWH	Institute for Work and Health
JHSC	Joint Health and Safety Committee
JPNC	Joint Provincial Nursing Committee
JUMC	Joint Union-Management Committee
LC	Local Coordinator
LCNI	Late Career Nurse Initiative
LEAF	Women's Legal Education and Action Fund
LEAP	Legal Expense Assistance Plan
LOA	Leave of absence
LRA	Labour Relations Assistant
LRO	Labour Relations Officer
LTC	Long-term care
LTD	Long-term disability
LTDNG	Long-Term Disability Network Group

<b>Acronym</b>	<b>Meaning</b>
MEET	Membership Experience and Events Team
MET	Membership Education Team
MGT	Management Team
MIRE	Membership information report excel
MJI	Member job inquiry
MNU	Manitoba Nurses Union
MOF	Ministry of Finance
MOH	Ministry of Health
MLTC	Ministry of Long-Term Care
MLITSD	Ministry of Labour, Immigration, Training and Skills Development
MP	Member of Parliament
MPP	Member of Provincial Parliament
MRS	Medical radiation sciences
MRT	Medical radiation technologist
NBNU	New Brunswick Nurses Union
NCLEX	National Council Licensure Examination (also NCLEX-RN)
NEB	National Executive Board (of the CFNU)
NGG	Nursing Graduate Guarantee
NHPNT	Nursing Homes Provincial Negotiating Team
NHRIPP	Nursing Homes and Related Industries Pension Plan
NICU	Neonatal intensive care unit
NP	Nurse practitioner
NPAO	Nurse Practitioners' Association of Ontario
NSNU	Nova Scotia Nurses' Union
NWAT	Nursing Week Advisory Team
OCHU	Ontario Council of Hospital Unions
OCOTH	Ontario Council of Teaching Hospitals
ODSP	Ontario Disability Support Program
OFL	Ontario Federation of Labour
OHA	Ontario Hospital Association
OH atHome	Ontario Health atHome

<b>Acronym</b>	<b>Meaning</b>
OHC	Ontario Health Coalition
OHCOW	Occupational Health Clinics for Ontario Workers
OHRC	Ontario Human Rights Commission
OHSA	Occupational Health and Safety Act
OLRA	<i>Ontario Labour Relations Act</i>
OLRB	Ontario Labour Relations Board
OLTCA	Ontario Long-Term Care Association
OMERS	Ontario Municipal Employees Retirement System
ONA	Ontario Nurses' Association
OPSEU SEFPO	Ontario Public Service Employees Union
OR	Operating room
ORPP	Ontario Retirement Pension Plan
PACU	Post anesthetic care unit
PCM	Provincial Coordinators Meeting
PCNO	Provincial Chief Nursing Officer
PDR	Performance development review
PEINU	Prince Edward Island Nurses' Union
PHIPA	<i>Personal Health Information Protection Act</i>
PHN	Public health nurse
PIPEDA	<i>Personal Information Protection and Electronic Document Act</i>
PIPSC	Professional Institute of the Public Service of Canada
PLM	Provincial Leadership Meeting
PP	Professional practice
PPE	Personal protective equipment
PRC	Professional responsibility complaint
PRWRF	Professional Responsibility Workload Report Form
PSHSA	Public Services Health and Safety Association
PSLRTA	<i>Public Sector Labour Relations Transition Act</i>
PSW	Personal support worker
PT	Part time
QA	Quality assurance
QBP	Quality-based procedures

<b>Acronym</b>	<b>Meaning</b>
R&R	Retention and recruitment
RAI	Resident assessment instrument
RHPA	<i>Regulated Health Professions Act</i>
RN	Registered nurse
RNAO	Registered Nurses' Association of Ontario
RNAT	Retiree Network Advisory Team
RNEC	Registered nurse (extended class)
RNFOO	Registered Nurses' Foundation of Ontario
RNUNL	Registered Nurses' Union Newfoundland & Labrador
RPN	Registered practical nurse
RPNAO	Registered Practical Nurses Association of Ontario
RSI	Repetitive strain injury
RTW	Return to work
SEIU	Service Employees International Union
SF	Supplementary funded
SMEs	Subject matter experts
SO	Suitable occupation
STD	Short-term disability
SUN	Saskatchewan Union of Nurses
UMS	Unified Membership System
UNA	United Nurses of Alberta
VONPNT	Victorian Order of Nurses Provincial Negotiating Team
WHSC	Workers Health & Safety Centre
WR	Work reintegration
WSIA	Workers Safety and Insurance Act
WSIB	Workplace Safety and Insurance Board
WT	Work transition