



# Chairperson's Manual

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A guide to answer questions about your role as Chairperson.

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# Welcome

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Being chairperson (or chair) of your local is an exciting way to serve your union and your members. This manual is a guide to answer some questions you may have about your role as chairperson.

Some of the tasks outlined in this manual are simply suggestions, and others are required by the *HEU Constitution and By-Laws*.

Throughout this manual, we highlight various Articles in the *Constitution and By-Laws*, explaining how they are applied in your role as chairperson and the regular operations of your local. This is also meant to give you step-by-step instructions on how to make your role easier.

The *Chairperson's Manual* is just one of many resources available to you as chairperson. Contact the HEU President's Office to access further resources about chairing a membership meeting and ensuring your local operates effectively. As well, the secretary-treasurer mailings provide lots of information on important topics and events. The HEU website ([www.heu.org](http://www.heu.org)) is also an excellent source for up-to-date news about bargaining, organizing, education, and union activism.

Remember that this manual is based on the successes and lessons learned by HEU local chairpersons, like you, from across British Columbia. If you have suggestions of things to add or change, please contact the President's Office by phone: 604-456-7003, toll-free: 1-800-663-5813 ext. 7003, or by email at [bnederpel@heu.org](mailto:bnederpel@heu.org).

I look forward to hearing from you!



**Barb Nederpel**  
President  
Hospital Employees' Union

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## SECTION ONE

# Chairperson, Your New Role

Congratulations and welcome to your new role as chairperson. According to the *HEU Constitution and By-Laws*, the role of a chairperson is defined as:

### ARTICLE 16 Duties of Local Officers

#### Section A

**CHAIRPERSON:** The Chairperson shall preside at all regular and special meetings of the local, call special meetings if requested by five per cent (5%) of the Local Membership (in no instance shall less than ten (10) Members be empowered to call a special meeting) and perform such other duties as may of right pertain to this office. It shall be the Chairperson's duty to see that all other Officers perform their duties strictly in accordance with the *Constitution and By-Laws*. The Chairperson shall also be ex-officio Member of all committees.

But a chairperson is so much more than that.

An effective chairperson motivates local executive officers, activists, and members. They are a strong listener, a team builder, and are seen as fair and impartial, earning the trust of the membership and helping to build a strong and united local.

Being organized is essential to meeting the many demands of the role. A chairperson recognizes the strengths and development needs of the team, drawing on individual skills while also identifying opportunities for mentorship, education and leadership growth.

The chairperson should lead by example and help set a clear vision grounded in trade unionism and social justice. While the mechanics of chairing meetings, setting agendas and ensuring that the *Constitution and By-Laws* and union policies are followed, critical responsibilities, a thriving local depends on a chairperson who is responsible, engaged, knowledgeable, and committed to building a strong local, union and community.

The chairperson is an ex-officio member of all committees, meaning they hold an oversight role by virtue of their position to support coordination, alignment, and accountability across the local. This does not make them a regular member of committees, and they do not participate in committee work or decision making. The ex-officio role does not provide automatic access to all committee discussions or information, and confidentiality must be respected at all times. For example, a chairperson who is not a shop steward would be made aware of the general grievances and issues at the workplace, but would not be privy to the confidential information contained within the grievances.

In merged or multi-site locals, the chairperson must ensure all worksites are meaningfully included in meetings and decision-making. This may require flexibility in scheduling, locations and thoughtful consideration when appointing committees and other representatives.

Above all, the chairperson must conduct the business of the local in accordance with the *Constitution and By-Laws* of the union, the *by-laws* of the local, and union policies, ensuring decisions are made fairly, transparently, and in the best interest of the membership.

## WHERE TO START

The local executive elected alongside you is your team, and each member has specific responsibilities as outlined in the *Constitution and By-Laws*, Article 16, Duties of Local Officers. Together, you are responsible for ensuring the local operates effectively and in the best interests of the membership.

The first thing you need to do after the election is to call your team together for your first executive meeting to discuss how the local executive will function for the next term. This initial meeting gives you the opportunity to get to know each other as a team and determine what your collective goals and vision are for the upcoming term. You will also specifically need to review and discuss:

- Governance responsibilities
- Duties of local officers
- Membership meetings
- Executive meetings
- Shop stewards, JOHS committee and worker health and safety reps and other committees
- By-laws and standing motions
- Finances and budget

## GOVERNANCE

All executive members and stewards carry fiduciary responsibilities. This means acting with loyalty, care, and confidentiality in all decisions and actions. They are expected to put the interests

of the union and its members above their own personal interests, make informed and responsible decisions, protect sensitive information, and uphold the Constitution and By-Laws, and union policies at all times. This includes recognizing and appropriately managing any real or perceived conflicts of interest.

The local executive functions as a collective body. While individual officers have specific roles, decisions are made collectively, and all members are expected to support those decisions once made. Executive members are accountable to the membership and must carry out their duties with honesty, integrity, and respect for one another, contributing to a constructive, professional working environment.

## **DUTIES OF LOCAL OFFICERS**

It is important to ensure that everyone on the team knows their role and makes every effort to fulfill their responsibilities. Regular communication among the executive ensures duties are being carried out and the workload is fairly and effectively distributed.

Recognize and be responsive to the strengths and gaps within the group and the local. Provide support, mentorship, and access to resources to help each other succeed in their roles.

Be mindful of burnout amongst each other. Distribute and delegate tasks, and include eager members not on the executive who are willing to help. Build a culture of support and gratitude, taking the time to show appreciation for each other.

Growing your team of activists and succession planning is essential. The executive should create opportunities for members to get engaged and involved, learn, and grow through education, mentorship and participation in union activities. Practices such as rotating attendance or sending additional members to union events, inviting members to shadow experienced stewards, or ensuring that even mildly curious members have opportunities to contribute even to smaller projects can help build confidence and capacity over time.

As outlined in Article 16, some executive positions are identified as “optional” but only with “approval of the Local Membership and the Provincial Executive.” This means, these positions are required to be elected unless a motion is passed at a local meeting with quorum to remove them from the executive structure, and the Provincial Executive has approved the exclusion.

Your local may also establish additional executive positions, such as a site representative from another location or sector to ensure there is fair representation on the executive with voice and vote. This also requires a motion at a local meeting, with quorum, and approval of the Provincial Executive. More about this in Section 6, *Local by-laws*.

The executive can also assign ongoing or additional duties to individual local officers to ensure important work is completed and responsibilities are shared across the team.

How to determine assignments for local officers:

- Identify priorities for the year – considering available resources and the needs of the local.

- Consult with your local executive about their interests, skills, and capacity.
- Develop and document job descriptions for local officers or processes used. This will help clarify expectations and ensure continuity over time.

## Vice-Chairperson

### ARTICLE 16 Duties of the Local Officers

#### Section B

**VICE-CHAIRPERSON (OPTIONAL ONLY WITH THE APPROVAL OF THE LOCAL MEMBERSHIP AND THE PROVINCIAL EXECUTIVE):** The Vice-Chairperson shall assist in keeping order, and in the absence of the Chairperson preside over meetings of the local. The Vice-Chairperson shall assist the Warden and see that no one enters the meeting who is not a Union Member. In locals of two hundred (200) Members or more, the Vice-Chairperson of the local may be the co-ordinating Officer between the Shop Stewards' Committee and the local executive.

The vice-chairperson (or vice-chair) can be assigned duties as needed, but is primarily elected to support and replace the chairperson as required, or permanently if there is a resignation. It is very important to have someone who can step in immediately, if and when needed.

The vice-chairperson is often the third signing authority on bank accounts, with the secretary-treasurer and chairperson being the first two.

## Secretary-Treasurer

### ARTICLE 16 Duties of the Local Officers

#### Section C

**SECRETARY-TREASURER:** The Secretary-Treasurer shall keep a correct, full and impartial account of the proceedings of each regular meeting and local executive Meeting, and forward copies of these minutes, bearing the signatures of both the Secretary-Treasurer and the Chairperson of the local, to the Provincial Office, Burnaby Site, and the Regional Office.

The Secretary-Treasurer shall also receive and deposit in a Credit Union or Chartered Bank as the local may designate, all monies received from the Provincial Office, Burnaby Site, and shall pay all bills sanctioned by the local, by cheque, and/or other methods. The Secretary-Treasurer shall keep an accurate account, and forward a quarterly financial statement, which has been reviewed by the Local Trustees, to the Financial Secretary. In the absence of both the Chairperson and the Vice-Chairperson, the Secretary-Treasurer shall convene the local meeting and shall have a Chairperson elected pre-term.

The secretary-treasurer has responsibilities. They take minutes of all meetings, create draft agendas for meetings, put up meeting notices, do the banking, pay bills, coordinate with trustees, submit minutes and other documents to the Provincial and Regional offices, and receive and distribute mailings from Provincial Office.

## Assistant Secretary

### ARTICLE 16 Duties of Local Officers

#### Section D

**ASSISTANT SECRETARY (OPTIONAL ONLY WITH THE APPROVAL OF THE LOCAL MEMBERSHIP AND THE PROVINCIAL EXECUTIVE):** The Assistant Secretary-Treasurer shall assist the Secretary-Treasurer in performing the duties set out under “Secretary-Treasurer.”

In many locals, the assistant secretary-treasurer helps the secretary-treasurer with the workload, which can be divided by tasks based on their skill sets. Other locals split the position into secretary and treasurer as distinct and defined roles under their Local by-laws, and the two positions are elected accordingly.

## Trustees

### ARTICLE 16 Duties of Local Officers

#### Section E

**TRUSTEES:** The Trustees shall have general supervision over the property of the local subject to such instructions as they may from time to time receive. They shall examine the books of the local quarterly and report to the Financial Secretary. They shall see that the Secretary-Treasurer deposits all money belonging to the local in a Credit Union or Chartered Bank as the local may designate. They shall perform such other duties as the Provincial Executive, the local or the Constitution may direct.

As stated in the Article, trustees primarily examine the financial statements of the local and sign the quarterly reports.

They have the very important job of ensuring the local is financially sound and accountable to the membership. However, it is not a big time commitment, which is ideal for some members who want to contribute to the executive without taking on too much extra workload. Trustees cannot be signing authorities on the bank account.

## Conductor

ARTICLE 16  
**Duties of Local Officers**

**Section F**

**CONDUCTOR: (OPTIONAL ONLY WITH THE APPROVAL OF THE LOCAL MEMBERSHIP AND THE PROVINCIAL EXECUTIVE):** The Conductor shall conduct candidates through the initiation ceremony and perform such other duties the union may direct

When the local meeting is about to start, the conductor discusses the sign-in sheet with the warden to determine if there are members present who have never attended a meeting. When you get to agenda item #5 in the Order of Business, “Initiation of New Members”, the conductor reads the *Oath of Obligation* and every member will stand, if able, repeat the oath together, and at the end everyone gives a welcoming cheer. The conductor will then present the new members with an HEU pin, a copy of the *Constitution and By-Laws*, current collective agreement, the *Local by-laws*, and any other relevant documents. Where there is no conductor or the conductor isn’t available, the Chairperson will read the Oath.

## Warden

ARTICLE 16  
**Duties of Local Officers**

**Section G**

**WARDEN (OPTIONAL ONLY WITH THE APPROVAL OF THE LOCAL MEMBERSHIP AND THE PROVINCIAL EXECUTIVE):** The Warden shall take charge of the door and prevent any non-Members from entering the meeting unless requested otherwise by the Chairperson. The Warden shall record all Members’ attendance at the meetings.

The warden will provide the official sign-in book for members and guests as they enter the meeting and ensures that full names are recorded and legible. They also record the names of members who attend virtually on the members’ behalf. This book is used as documentation for determining the eligibility of members for elections. Locals may also consider using this book to collect information about which department or site a member works at and their contact information (please see Section 12 regarding “Privacy and Member Information”).

The warden will inform the conductor if there are new members in attendance prior to the meeting being called to order. The warden also ensures that only members and welcomed guests are in attendance, and may be instructed by the chairperson to escort anyone out who is being disruptive.

## Officer Vacancies

### ARTICLE 16

#### Duties of Local Officers

##### Section I

**OFFICER VACANCIES:** Should any Officer fail to answer the roll call for three (3) consecutive meetings without having a good excuse for these absences, or should any Officer resign or in the event of the death of any Officer, the office shall be filled at the next regular meeting of the local. The office of the Chairperson shall be filled by the Vice-Chairperson; all other vacancies shall be filled by election.

During the temporary absence of any Officer, the Chairperson shall appoint a local executive member to fill the vacancy. A local may elect up to five (5) Alternates to fill in for these periods of time.

If the chairperson vacates their position, the vice-chairperson replaces them for the remainder of the term and an election must be held to fill the vice-chairperson position as soon as possible. All other vacancies will need to be elected at the next meeting. However, the chairperson can assign the duties from the vacancies to a current executive member where appropriate. If the local has a by-law to elect alternates, the vacancies can be filled this way, but again, only on a temporary basis until an election can be held.

## MEMBERSHIP MEETINGS

### ARTICLE 14

#### By-Laws Covering Locals

##### Section D

**LOCAL MEETINGS & QUORUM:** Locals failing to call regular meetings as required under the *Constitution and By-Laws* for three (3) successive months shall be put under trusteeship and administered by the Provincial Office, Burnaby Site, until such time as the Provincial Executive is satisfied that the provisions of the *Constitution and By-Laws* are followed.

Meetings may be suspended by the locals subject to the approval of the Provincial Executive with the exception of July, August and December meetings which require approval of a regular local meeting only.

In addition to the local making decisions and conducting business, it is required that locals hold regular, monthly meetings to provide an opportunity for members to discuss what is happening in their workplaces, learn about issues and upcoming events, and ask questions.

There can be great benefit to having a consistent schedule so that members always know when the meetings are.

However, health care is a 24-hour, seven-days-a-week industry, so it is important to take into consideration the different schedules of the membership. Locals may consider rotating locations and times to be as inclusive as possible.

Find what works for your local and reconsider it once a year to ensure it is meeting the needs of the membership.

As the article states, if the local wishes to suspend required meetings in July, August and/or December, they need to pass a by-law motion at a local meeting with quorum. If they want any further adjustments, that would need to be additionally approved by the Provincial Executive. And the local cannot go more than three consecutive months without holding a meeting.

## EXECUTIVE MEETINGS

The executive should meet regularly, and stay connected by email and phone as necessary. Specifically, it is advisable that they meet the week before a local general meeting so the team can discuss the ongoing work being done, the communications from the Provincial Office, and prepare the agenda with executive recommendations for the next meeting.

## POPULATE YOUR SHOP STEWARD, JOHS AND OTHER COMMITTEES

### Shop Stewards

#### ARTICLE 14

### By-Laws Covering Locals

#### Section B

**UNION COMMITTEES:** Union Committees shall consist of Shop Stewards' Committee and any other Committee deemed necessary by the Local Membership. Members of Committees may be appointed by the Executive and shall work under the direction of the elected local executive committee.

Shop stewards and JOHS/worker health and safety reps play a vital role at the worksite on behalf of the membership. However, these are distinct and separate roles from the elected local executive. Both must abide by union policy in carrying out their duties, but the stewards have the added responsibility to fairly represent members under the Labour Code.

While an executive member may also serve as a steward, the steward role is not dependent on holding elected office. Stewards are workplace-based representatives whose primary responsibility is to support members and uphold the collective agreement at the point of contact with the employer.

A steward's role is to observe and respond to what is happening in the workplace, including identifying patterns and workplace culture issues.

They perform duties outlined in your collective agreement, monitor for contract compliance, support and advocate for members with concerns or complaints, investigate and present grievances, provide moral support, develop awareness on a variety of union issues, and may act as a union representative on union-management committees.

Stewards are advocates for the members. They ensure the collective agreement is enforced fairly and consistently, and they are often the first point of contact for members seeking information, support, and representation.

By enforcing the collective agreement, stewards protect the rights that have been achieved through collective bargaining. Every provision reflects negotiated gains, and each one matters.

Stewards also play a key role in building an informed, engaged, and organized membership that is prepared to act collectively when needed.

## **Joint Occupational Health and Safety Committees (JOHS) Worker Reps**

The Workers Compensation Act (WCA) and the Occupational Health and Safety Regulation set out the health and safety requirements for BC workplaces. The law requires a **JOHS committee** for each employer with **20 or more employees** at the worksite. In worksites with **9 and 19 employees**, a JOHS committee is not required but a **worker health and safety representative** must be appointed.

JOHS committees and worker representatives in smaller workplaces are one of the most important ways the union can ensure that employers are meeting their health and safety responsibilities. The union's right to participate in health and safety through JOHS committees and worker representatives is written into the WCA and into HEU collective agreements.

### **JOHS committee members and their alternates:**

- Attend committee meetings
- Advocate for workers
- Connect with workers and employers to raise awareness of health and safety
- Regular JOHS committee reps attend monthly meetings
- Alternate JOHS committee reps attend meetings when the regular rep is unable to.

Worker representatives on JOHS committees are entitled to eight hours of employer-paid training and instruction per year.

## **Appointment of Shop Stewards**

As outlined in Article 14, Section B, shop stewards may be appointed by the local executive.

Best practice is for the *local executive* to appoint steward teams and designate a Lead Shop Steward through a clear, transparent and equitable process set out in the local by-laws. A well-defined

process builds member confidence by ensuring appointments are fair, consistent, and based on the needs of the membership.

Appointment enables the executive to make thoughtful, informed decisions that strengthen the overall effectiveness of the steward team and support long-term planning. This approach ensures that stewards are selected based on their skills, commitment, and readiness to represent members and uphold the collective agreement.

An Expression of Interest process is a valuable tool to support equitable appointments. Inviting members to apply helps identify relevant skills, supports diversity and inclusion, and creates opportunities to engage and develop new activists.

A structured appointment process promotes consistency and fairness in selecting members with the leadership skills, knowledge, and commitment required for the role. In forming the steward team, local executives should consider continuity, experience, worksite representation, and diversity to ensure members are supported effectively across all areas of the workplace.

Stewards are accountable to the local executive and are expected to carry out their duties in accordance with the collective agreement, union policies, and established practices. Ongoing education and training are essential components of the role, ensuring stewards continue to build the skills and knowledge required to effectively represent members.

Appointment also allows the executive to regularly evaluate the effectiveness of the steward team. Where necessary, adjustments, including reassignment or removal, may be made to ensure the team remains functional, responsive, and aligned with member needs. Where elected, the local by-laws should outline a clear process for addressing performance or conduct concerns, consistent with the principles of natural justice and fairness.

For Lead and Dedicated Shop Steward roles, which carry additional responsibility, locals should include clear criteria in their by-laws. This may include demonstrated leadership and organizational skills, relevant experience, completion of steward training or education, ensuring these positions are filled in a way that reflects their scope and responsibility.

In all cases, the protection and enforcement of members' collective agreement rights must remain the central consideration in steward selection and oversight.

### **Appointment of JOHS committee members and worker health and safety representative**

The law requires that in unionized workplaces the union appoints its worker health and safety representatives. In HEU, the local executive is responsible for these appointments.

## How does the local know if they need to appoint an HEU worker rep to a JOHS committee or appoint a worker health and safety rep in a smaller workplace?

A local executive could be notified that an HEU worker rep is needed for a JOHS committee or a worker health and safety rep is needed in a smaller workplace, by one of the following persons:

- A current member if they are stepping down or need an alternate
- A JOHS committee co-chair (worker or employer)
- The employer (HR or an OHS Department)
- An HEU servicing rep or an HEU OHS rep

The appointment process and templates for appointments is outlined in the appointment booklet, *Health and safety appointment in your local*, [www.heu.org/local-executive-documents](http://www.heu.org/local-executive-documents)

## Other Committees

When possible, locals are encouraged to create committees similar to the union's equity standing committees: Ethnic Diversity, Indigenous Peoples, People with Disabilities, Pink Triangle, 2-Spirit, Women & Non-Binary, Young Workers', or the P.E. subcommittees, such as environment, political action, or global justice and peace.

The local can create any committee that activists are interested in, such as goodwill, poverty reduction, or event planning. Be sure to determine beforehand the mandate of the committee, how they are populated (by election, appointment or voluntarily), and if there is a budget attached to the committee.

See Section 8 for more information on possible "Local Committees".

## BY-LAW REVIEW

The *Local by-laws* are a collection of standing motions adopted at meetings with quorum. They establish how the local operates within the framework of the Constitution, and provides consistent membership driven direction to the executive.

Following each local election, the new executive should review the Local by-laws to ensure they remain relevant, effective, and aligned with the current needs of the membership. This review can also help inform priorities and work planning for the term. Where a local does not yet have by-laws, the executive should develop them using the process outlined in Section 6 of this manual.

By-laws address significant and structural matters at the local level. Under Bourinot's Rules of Order, any motion to adopt or amend a by-law requires a notice of motion.

A notice of motion is advance written notice provided to the membership that a specific motion will be brought forward at a future meeting. This ensures members are informed ahead of time and have the opportunity to consider the proposed change before it is debated and decided.

All changes to Local by-laws must be approved by the membership at a meeting with quorum and subsequently submitted to the Provincial Executive for review and approval.

**FINANCES AND BUDGET**

The secretary-treasurer will have, or will have to get if new to their position, the previous minutes and the ledger of revenues and expenses. Signing authorities may have to be updated at the bank to reflect any change to the three signing officers, usually the chairperson, vice-chairperson, and the secretary-treasurer. Larger locals may opt to have four signing authorities which would include the assistant secretary. The trustees cannot have signing authority.

It is advisable that a budget be crafted by the local executive and brought to a local meeting with quorum for final amendments and approval. This will ensure that the local is spending their rebates responsibly and transparently, plus it allows for the members to make informed financial decisions throughout the year.

A budget is based on the average rebates received in the previous year, expected operating expenses, and estimated costs for projects and plans for the term.

The ledger from the previous year will also help determine expenses that should be anticipated for the following year.

Local Budget Example		
Yearly Rebates		\$5,500.00
Small and Mid-Size Local Supplement		1,500
Expenses		
Office Supplies	\$300.00	
Labour Council Dues	\$620.00	
Meeting expenses	\$1,200.00	
Pride march	\$500.00	
HEU Day event	\$2,000.00	
Total Expenses		\$4,620.00
Surplus (Deficit)		\$2,380.00



## SECTION TWO

# Membership Meetings

Local meetings are so much more than a time and place to get the union business done. This is where the democratic decision making comes alive, as members gather to learn about the activities of the union and to participate in the democratic process of directing the business of the local.

## RUNNING MEETINGS

A good meeting is a planned meeting. Members appreciate an effective chairperson that:

- Starts on time
- Prepares and follows the agenda
- Keeps speakers on topic
- Follows the *Rules of Order* (see Section 4 for additional information)
- Makes sure everyone can participate
- Keeps order, but does not shut people down
- Encourages discussion by listening to one speaker at a time so each member will be heard
- Watches what works – you may develop unique ideas that work for your local
- Meeting room is accessible, has good acoustics, proper equipment and seating arrangement is effective and conducive to discussion
- Is confident running a virtual meeting and has strong internet connection

ARTICLE 14  
**By-Laws Covering Locals**

**Section D**

**LOCAL MEETINGS & QUORUM:** Each local shall hold regular meetings. Notice of such local meeting must be displayed on the local's notice board for a minimum of seven (7) days in advance of the meeting.

**POSTING A MEETING NOTICE**

Official local business cannot take place unless the meeting has quorum and you have provided seven (7) days' advanced notice. This notice must be posted by the secretary-treasurer, site rep, or designated member, on a union board, but can also be sent out by email, or posted on the local's social media. It is important to be consistent and provide the most extensive distribution of the notice as possible. Merged locals or locals with multiple sites should consider how to ensure notice is reasonably provided as widely as possible (consider building email lists and using social media for example).

**KNOW YOUR QUORUM**

Quorum is the minimum number of people required in attendance based on the size of your local. You can find the number of members on the rebate form from the Provincial Office. Without quorum, the local cannot pass any motions, spend any money, or hold contested elections unless otherwise outlined in the Constitution. You can and are encouraged to continue a meeting without quorum so that everyone remains informed.

ARTICLE 14  
**By-Laws Covering Locals**

**Section D**

**LOCAL MEETINGS & QUORUM**

The quorum for local meetings shall be as follows:

- a) fifty (50) or less, quorum of 5,
- b) one hundred and seventy-five (175) or less, quorum of seven (7),
- c) one hundred and seventy-six (176) to three hundred (300), quorum of nine (9),
- d) three hundred one (301) to five hundred (500), quorum of fifteen (15),
- e) five hundred one (501), to one thousand (1,000), quorum of twenty (20),
- f) one thousand one (1,001) and over, quorum of twenty-five (25).

For the purposes of defining Membership in this Section, the Dues Check-Off List shall constitute a local's Membership total.

## GETTING QUORUM

There are many ways to connect with members and encourage them to attend union meetings. Experiment with your local and see what works. Here are some ideas:

- Commit to running a smooth and efficient meeting
- Provide refreshments and food
- Door prizes from the HEU Boutique are appreciated and promote membership pride in their union.
  - Bring a co-worker, extra ballot in the draw
  - First time? Extra ballot
  - Answer an HEU trivia question correctly, extra ballot.
  - Attend 3 meetings in a row? Extra ballot!
- Provide dependent and child care options
- Walk around facility to personally invite members to the meeting
  - Distribute printed invitations with the meeting information
  - Distribute business cards printed with key officer and steward contact information
  - Hand out pens, lanyards or other HEU merchandise, and collective agreements in exchange for a Facebook follow or email sign up
- Use compelling attention-grabbing subject lines for meeting notices and email invitations
- Remind members about question period
- Organize around an issue that matters to members. Could be a workplace or community issue
- Set up a local Facebook page and create an “event” for the meeting that automatically invites members of the group
- Send out meeting reminders the day of the meeting
- Distribute a membership survey to find what day, time and location works best for the majority of the local members. Consider changing or alternating times and locations.
- Map your local in order to identify and develop communication networks, and to identify natural leaders in the workplace that can help promote the meeting
- Invite guest speakers to share information about:
  - A common collective agreement issue where a Rep can explain what the language means and how to enforce it
  - Provincial Executive members can provide updates on union activities, campaigns and issues
  - Bargaining updates
  - Pensions, Municipal Pension Plan, Canada Pension Plan experts
  - International solidarity, global justice, human rights activists
  - Community leaders to discuss issues and opportunities outside the union
  - Labour leaders to discuss, events and activities in the broader labour community
  - Municipal, provincial or federal politicians prior to elections or to discuss issues

- Hold special celebrations, provide cultural entertainment and food, or highlight an occupation or department.
- Post or send the links to the HEU videos such as, Your Union in Two and a Half Minutes or one of the many equity videos, for your meeting invite

## DEVELOPING A LOCAL MEETING AGENDA

### ARTICLE 1 Order of Business

1. Call to Order
2. Indigenous Land Acknowledgement
3. Roll Call of Officers
4. Equity Statement
5. Initiation of Members
6. Reading of Minutes
7. Correspondence
8. Treasurer's Report (Revenues and Expenses)
9. Trustee's Report
10. Report of Delegates and Committees
11. Unfinished Business
12. Elections and Installation of Officers
13. New Business
14. Good and Welfare
15. Questions Period
16. Adjournment

## Local Meeting Agenda

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### Name of Local Meeting Agenda

### Date

#### 1. Call to Order

#### 2. Indigenous Land Acknowledgement

- To ensure that we are actively participating in Reconciliation, the Chairperson will take a moment to acknowledge the Indigenous lands on which they are hosting the meeting. To find out the territory you are on, [www.native-land.ca](http://www.native-land.ca).

#### 3. Roll Call of Officers

- The secretary-treasurer will list the executive members, and those in attendance will identify themselves as present. If an executive member has sent regrets that they are unable to attend, that will be noted at this time (i.e. “Trustee Jane has sent regrets as she is on vacation.”).

#### 4. Equity Statement

- The *Equity Statement* is to be read out by the chair at the beginning of all local meetings to set the tone of respect and inclusion. You can find this in the *Membership Meeting Reference Manual*.

#### 5. Initiation of Members

- The conductor leads the initiation of members who have not yet attended an HEU meeting (*Constitution and By-Laws*, Article 18, or in the *Membership Meeting Reference Manual*).

#### 6. Reading of Minutes

- The secretary-treasurer reads the minutes from the previous meeting, which covers a brief description of the items discussed and clearly stating the motions that were made, amended, referred, tabled, accepted or defeated. Amendments can be made by members if the minutes are not accurate and the document is adopted into the local’s permanent record.

#### 7. Correspondence

- A list of all of the correspondence received by the local can be read out by the secretary-treasurer. Items of particular interest and those requested by the members can be read out in full, with discussion, questions or comments, and copies of the correspondence can be requested by the members either in digital or photocopied format, as well as being posted to the union board.

#### 8. Treasurer’s Report (Revenues and Expenses)

- Secretary-Treasurer will report on the statement outlining the rebates that have been received by the local and a list of the expenses paid out. All expenses need to be

supported by a standing motion or a previously passed motion. A reconciled bank balance is also required.

**9. Trustees' Report:**

- The senior trustee, or other trustee if the senior trustee is not present, should give a report on when the last quarterlies have been signed off and report on any findings.

**10. Report of Delegates and Committees:**

- Members who have attended union-related workshops or events should report to the meeting about their experience and necessary follow up.
- Committees report on previous or upcoming items and introduce motions as necessary.
- If there is a Provincial Executive member or staff representative present, they can provide a report at this time.

**11. Unfinished Business:**

- Items that have been on previous agendas are carried over each month until they are completed and reported on.

**12. Elections and Installation of Officers:**

- Elections are held for new executive members, for delegates to bargaining conferences, and various conventions. More information about this process can be found in Section 8.

**13. New Business:**

- New items can be added to the agenda from various sources:
  - The executive meeting held prior to a local meeting
  - Chief shop steward, committee chairs and local members can submit agenda items or topics
  - Upcoming events, issues, campaigns or educational opportunities highlighted in the correspondence from Provincial Office

**14. Good and Welfare:**

- Executive or members can announce or have a general discussion about various items not necessarily relating to the operations of the local.

**15. Question Period:**

- Members sometimes will have questions for the executive or guests, such as a Provincial Executive member or staff representative, that have not been covered under the agenda. If questions arise that remain unanswered, it is important that the chair seek out the information from a reliable source and report back.

**16. Adjournment**

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## VIRTUAL OR HYBRID MEETINGS

### ARTICLE 14

#### By-Laws Covering Locals

##### Section D

**LOCAL MEETINGS & QUORUM:** Local meetings may be held using electronic or virtual conferencing platforms at the expense of the local, or by a mix of virtual and in-person attendance provided the local has a clear process to conduct votes, record attendance, and monitor for quorum.

Technology has made it possible for more members to participate in local meetings, regardless of their shift, location, or personal circumstances. Virtual and hybrid meetings, where some member attend in person and others online, are particularly valuable for merged locals or those spread across multiple worksites. Some locals have had success setting up meeting rooms at different sites that connect to a single virtual meeting, allowing groups of members to gather together while participating in one shared meeting. Every local is different and what works for one, may not work for another, and there are varying levels of comfort in using technology. The important thing is to be consistent, intentional, and used to increase participation, not become a barrier.

#### Quorum and Voting Integrity

Virtual and hybrid meetings require extra attention to quorum and voting. The local must have a clear, consistent method for recording attendance — including members joining online — and for conducting votes in a way that is fair, verifiable, and protected from interference.

The Chairperson can remind members to change their screen name to their first and last names and where this is not possible, have someone designated to do this for them. The warden will record these names in the attendance records and indicate that they attended virtually. The warden will also need to monitor for late arrivals.

Where members are gathering in groups at different sites, designate a warden or site representative at each location to confirm that participants are physically present and that quorum counts are accurate.

Establish your approach to voting before the meeting begins and communicate it clearly to members. Options include raised hands if cameras are on, the platform's built-in raise hand feature, responses through the chat, or a poll tool if your platform supports it. Whichever method you use, apply it consistently and ensure phone-only participants are not inadvertently excluded when calling votes. Some platforms offer built-in polling tools that display results clearly on screen; these take practice but can make voting more transparent and easier to manage. Test your chosen method with your executive before using it at a general membership meeting.

## Camera Policy

Before holding a virtual or hybrid meeting, the local should establish a clear policy on whether members are required to have their cameras on. This decision has real implications: cameras-on makes it easier to manage the speakers' list, track engagement, and confirms who is in attendance, but it may create barriers for members with limited bandwidth, privacy concerns, or accessibility needs. Whatever policy the local adopts, communicate it clearly in the meeting invitation and apply it consistently. Where cameras are off, the chairperson will need to rely more heavily on the raise hand feature, the chat, or roll call to manage participation.

## Security and Privacy

Union meetings contain sensitive information and must be protected from employer access or outside interference. To protect the security and privacy of your meetings:

- Never share the meeting link or password in any public forum, including public social media pages.
- Use personal email addresses — not workplace email — to distribute meeting invitations. Workplace email may be monitored by the employer, which could compromise the confidentiality of union business.
- If the meeting is being recorded for accessibility or record-keeping purposes, inform all participants clearly at the outset. Members have a right to know when they are being recorded. **Recordings are not to be shared with anyone, by anyone.**
- At the end of the meeting, be aware that chat logs — including private messages — may be visible to the host. Remind participants of this at the start of the meeting.

We have put together a resources page on the HEU website to support you in having online and/or hybrid local meetings. This page includes in-depth Zoom training videos as well as downloadable resources.

Also be sure to watch and share the Mock Local Meeting to see a virtual meeting in action. This is a helpful tool for learning how to pass motions, give reports, and use the virtual tools for a meeting.

You can find the videos at <https://www.heu.org/resources-for-online-meetings>.

## Tips for Video Conferencing

### Before the Meeting

- Plan agenda items in advance. Keep the meeting as focused and time-limited as possible, and build in breaks for longer sessions.
- Send out agenda and reading materials (action agenda, scanned correspondence, etc.) with the meeting invitation.
- Decide how votes and speakers' list will be managed and communicate this to the members at the start of the meeting.
- Confirm camera policy and include in the meeting notice.
- Assign an executive member assist the chairperson during the meeting who can mute/unmute speakers, share documents onscreen, assist in monitoring chat and tracking raised hands, so that the Chairperson can focus on running the meeting.

- Use only personal emails to send meeting invites, not workplace email.
- Do NOT post the meeting address and password in any public forum to prevent non-HEU members from attending unless you consistently verify attendees at the meeting.
- Use the local Online Meeting Poster Template to provide notice to members. You can find this on the HEU website.
- Open the meeting room 10-15 minutes in advance and encourage participants to sign-on early to resolve any technical issues before the official start time.

### **During the Meeting**

- Enable “mute on entry” or greet participants as they join and ask them to mute themselves until called on.
- Begin by informing participants of the camera policy, the voting method that will be used, and whether the meeting is being recorded for the purpose of preparing the minutes.
- Keep camera at eye level and minimize unnecessary movement.
- Be aware that your microphone may be live when you do not expect it to be, and remind participants of the same.
- Make time for human connection, particularly at the start of smaller meetings, a brief opening question or check-in ensures everyone has a chance to speak and helps people feel connected.
- If attending by phone only, actively include them throughout. Check whether they want to be on the speakers’ list and when calling for votes.
- When calling for votes, be deliberate: state the motion clearly, pause, call for those in favour, pause again, then call for those opposed. Do not rush.
- Act as you would in a face-to-face meeting. The camera is on you and members can see if you are distracted, on your phone, or not paying attention. Hold yourself to the same standard you would in the room.
- Chat messages, including private messages, may be visible to the host after the meeting. Remind participants of this at the start.
- Use screen sharing to display the agenda, motions, or correspondence so all members — regardless of whether they have printed materials — can follow along.
- Collaborative tools such as Google Docs can be useful for working through content together during a meeting when input from participants is needed in real time.

## **SPECIAL MEETINGS**

A special meeting can be called by the local executive outside of the regular meeting schedule, providing the requirement of seven (7) days’ advanced notice is given. This is sometimes used to deal with an urgent matter requiring a meeting with quorum. The meeting notice should be clear with the reason why the special meeting is being called, and be communicated to the membership as widely as possible.

A special meeting can also be called by the general membership as outlined under *Chairperson’s Duties*, Article 16, Section A, when there is an official request by at least five per cent (5%) of the local membership, but it cannot be less than 10 members. This is so members have the ability to call a meeting if they so choose, without having the executive’s approval.



### SECTION THREE

## Policy on Provincial Executive Outreach for Locals

### LOCAL INVITATIONS FOR P.E. MEMBERS TO ATTEND LOCAL MEETINGS

If a local executive wishes to invite a P.E. member, other than their regional vice-president, to attend their local meeting, they will contact the HEU President or Financial Secretary.

### ANNUAL LOCAL ELECTION MEETINGS

Provincial Executive members may attend local membership meetings to prepare for local elections, local nomination meetings, and when local elections are held to assist locals with electing their local executives.

Invitations from local executives are not required for P.E. to attend and have a voice at these meetings.

P.E. expenses for attendance at these meetings will be the responsibility of the Provincial Office.

P.E. members will notify the local chair or secretary-treasurer and the appropriate staff representative in advance that they will be attending the local election meeting.

P.E. members attending local election meetings will submit a written report on the meeting, including the election results, key issues raised by the membership during the meeting, and any follow up required.

### PROVINCIAL ISSUES, CAMPAIGNS OR INITIATIVES

From time to time, the Provincial Executive will decide it is important for P.E. members to attend local meetings to report on particular issues, such as bargaining or other significant events in the union, or to report on and/or mobilize members around campaigns or initiatives.

Invitations from local executives are not required for P.E. to attend meetings on these occasions, and P.E. will be given time on the agenda for their report.

P.E expenses for these meetings will be the responsibility of the Provincial Office.

P.E. members will notify the local chair or secretary-treasurer and the appropriate staff representative in advance, whenever they will be attending a local meeting for these purposes.

P.E. members attending these local meetings will submit a written report on the meeting, including the membership response to the campaign or initiative, key issues raised by the membership, and any follow up required.

## **PROVINCIAL EXECUTIVE LOCAL BUILDING**

As part of an agreed upon local building plan, a Regional Vice-President (RVP) doing local-building with a local executive is entitled to attend and have a voice at that local's meetings. Invitations from local executives are not required for P.E. to attend meetings on these occasions.

The RVP will notify the local chair or secretary-treasurer and the appropriate servicing representative in advance, whenever they will be attending a local meeting for these purposes.

P.E. expenses for these meetings will be the responsibility of the Provincial Office.

The RVPs will submit regular written reports on local-building with local executives.

## **GENERAL**

As per the *HEU Constitution and By-Laws*, the President, Secretary-Business Manager, and Financial Secretary may attend any local meetings or events to carry out the business of the union.

Provincial Executive members will defer to staff representatives on any questions relating to servicing or collective agreement issues, and will forward servicing issues to the appropriate staff representative or director.

Staff representatives will defer to the Provincial Executive member on Constitutional issues.

In preparation for attending local membership or executive meetings, P.E. members will consult with the appropriate staff representative about current local issues.

Provincial Executive members may seek pre-approval or be assigned by the Officers to attend local membership or executive meetings.

RVPs may log up to one hour, per month, per local for general outreach or attendance at meetings, not to include additional expenses such as travel. A report on the contact is required. The time will be accumulated towards a rest day.

P.E. members will submit written reports after each contact with a local.

Locals will be advised of this policy.



## SECTION FOUR

# Rules of Order (How to Chair a Meeting)

Parliamentary procedure is the foundation of fair, democratic meetings. These rules exist not for their own sake, but to ensure that every member has an equal opportunity to be heard, that debate is conducted with respect, and that decisions are made transparently and the rules applied consistently.

What matters most is not technical perfection. It is that the chairperson is facilitating a discussion in a way that is fair, inclusive, and consistent, that members genuinely understand the issue being debated, and that whatever decision is made is clearly understood by the room and properly recorded.

The Hospital Employees' Union uses *Bourinot's Rules of Order* unless specifically determined otherwise under Article 21 of the Constitution and By-Laws. These rules balance efficiency with fairness, allowing meetings to move forward productively while protecting every member's right to participate. They are a tool for inclusion, not exclusion.

Members are not likely to be familiar with these rules. It is up to the chairperson to explain the rules as required such as asking them to wait for their turn on the speakers' list, suggesting the appropriate place in the agenda to raise a specific issue, or the best way to word a motion. The executive can assist by leading by example and supporting the chairperson.

## SOME POINTS TO REMEMBER

- It is important that the chairperson remain impartial during the debate. They should not express their own position on issues while in the chair. If the chairperson wishes to speak to the motion, they say, "I am turning the chair over to the vice-chairperson in order to speak to the motion." The vice-chairperson should chair the debate until the motion has been voted on. The chairperson also should not vote on a motion unless there is a tie. This ensures the person chairing the meeting appears impartial.
- The chairperson must listen carefully to everything that is said to determine if anything is out-of-order.

- The chairperson should ensure there is no cross-talk or chatter. No one should speak until they are “recognized” by the chairperson.
- A speakers’ list should be kept in the order that their raised hands are seen by the chairperson. First-time speakers should be given precedence over second-time speakers on a topic, however, the chairperson can use their discretion to encourage equity and inclusion.
- All discussion and questions are addressed to the chairperson, who can redirect the comment to another member to respond. Debate directly between members should be discouraged.
- The chairperson ensures there is a thorough discussion, and that the motion and issue is understood before voting.

## HOW TO MAKE A MOTION

A motion is a proposal that brings attention to an issue and allows members to decide what to do about that issue.

### Step One: Move the motion

When a member wishes to propose an action, the Chair must “recognize them” first. Then they will state a motion that usually describes WHO will act and WHAT action will occur. It should also be constructed in a way that provides clear direction but also has appropriate limitations. The mover should not speak to the merits of the motion until it has been properly moved and seconded.

**Mover:** “I move that the local donate \$100 to the local food bank.”

### Step 2: Second the Motion

There should be no debate or discussion unless a motion has been properly seconded by someone else. If a motion isn’t automatically seconded by a delegate, the Chair may ask for one.

**Chairperson:** “Is there a seconder?”

However, a chair does not have to ask for a seconder. A seconder doesn’t necessarily have to agree with the motion, but deems the issue worthy of discussion. If no one seconds a motion, the Chair can move along to the next item.

### Step 3: Debate the motion

The Chair then restates the motion to ensure that it is heard and recorded correctly, and then calls for debate on the motion.

**Chairperson:** “The motion has been moved and seconded that the local donate \$100 to the local food bank. I will open the floor for debate.”

The person making the motion is usually given preference to speak to the motion first to “motivate” why they brought the motion forward.

The Chair is impartial, fair, and uses good judgement during the discussion. A decision is stronger when the local hears all views on an issue. A speakers’ list will help the Chair keep track of who is

to speak in which order, ensuring that second time speakers are only recognized if there are no first time speakers.

A member may ask the mover or someone other than the chair for more information but they should only do so through the Chair, and the Chair must recognize the responding member prior to them answering.

A variety of things can happen to the main motion during this debate, including amendments, referral, table, etc... These will be covered later in this section.

#### **Step 4: Hold the vote**

After there are no more speakers on the topic, or the question has been called, the Chair will restate the motion again.

**Chairperson: “The motion before you is for the local to donate \$100 to the local food bank.”**

The Chair will ask for all those in favour of the motion, and then all those opposed. The motion will be passed or defeated based on what the majority of the members voted.

The Chair should be prepared however, in case there isn't a clear majority or if the issue is controversial. The Chair should take their time in assessing if there is a majority or not, and when in doubt, count the number of votes in favour and against, and if necessary, hold a standing vote or use another method that clearly determines if the motion is carried or defeated.

#### **Step 5: The results**

The Chair should clearly state their ruling about the motion, including if it is carried or defeated, referred, tabled etc...

## **HOW TO AMEND A MOTION**

After a motion has been moved, seconded and the floor is open to debate, a motion can be made to amend the original motion. The amendment must relate to the main motion, must not negate the original motion, and must be clearly identified.

**Example: “I move to amend the motion that the local donate \$200 to the local food bank.”**

A motion to amend must be seconded.

The debate is opened to the floor, and must be only focused on the amendment, not the original motion. The person making the motion to amend is often given preference to speak first.

An amendment may be amended. The sub-amendment must relate to the amendment.

**Example: “I move to amend the motion that the local donate \$200 and the proceeds of a food drive to the local food bank.”**

There can never be more than two amendments on the floor at the same time (i.e. one amendment and one sub-amendment). Before another amendment can be made, at least one of the two amendments must be voted on.

The procedure to be followed for each motion, amendment or sub-amendment is:

- Moved
- Seconded
- Discussion
- Vote – All those in favour, all those opposed to the motion as amended.
- The motion is declared carried or defeated

Note: The order of voting is:

- 1st the sub-amendment, if any
- 2nd the amendment, if any
- 3rd the main motion (may be “as amended”)

## MOTIONS THAT END DEBATE

### Referral

A motion may be referred, i.e. to a committee or to a local officer. The motion could be: “I move to refer this issue to \_\_\_\_\_.” Once this motion to refer is seconded, it is non-debatable and must be voted on immediately.

### Tabling

A motion may be tabled in order that it can be discussed at a later date. The motion could be: “I move to table the motion until \_\_\_\_\_.” Once this motion to table is seconded, it is non-debatable and must be voted on immediately.

### Previous Question

The motion, “I move the previous question,” or more commonly, “I’d like to call the question,” can be used to end debate. The mover is asking to move onto the vote, regardless of the number of speakers remaining. Once it is seconded, it is non-debatable and must be voted on immediately. When carried, votes on the main motion and any amendments must be taken immediately without further debate. When defeated, the debate continues in the order of the speakers list. A speaker cannot speak on the issue, and then move the previous question.

## RULING A MOTION OUT-OF-ORDER

A motion is out-of-order if:

- It violates *Local by-laws*, the *HEU Constitution and By-Laws*, or *HEU Policy*
- The local does not have authority to deal with the matter

- It relates to an item elsewhere on the agenda
- It is a motion unrelated to an amendment when there is already a motion on the floor
- It is an issue decided at a previous meeting
- It is a motion to reconsider or rescind, when the previous motion has already been acted upon
- A notice of motion was required but not provided
- It is worded in the negative, meaning that it is a motion to not do something. A motion must be worded in the positive. It needs to say what the local will do.

## PRIVILEGED MOTIONS AND PROCEDURES

Privileged motions and procedures permit a member to intervene in the discussion out-of-turn. Because they offer this opportunity, it is essential that their use be strictly limited by the Chair. The following four are particularly useful, but often misunderstood and misused:

### 1. Point of Order

To draw to the attention of the chair an improper procedure or irregularity. Examples include:

- A speaker straying completely off topic from the motion on the floor,
- A motion being debated which has not been seconded,
- A motion having been accepted by the chair, while there is already another motion on the floor,
- Any violation of the *Rules of Order*.

When a member notices such an irregularity, they can call out “Point of Order” at any time – they do not need to wait until their turn on the speakers’ list. The Chair will then recognize the member and ask the member to state the Point of Order. If the Chair is satisfied that the Point of Order is valid, the Chair will take the necessary steps to rectify the situation. If the Chair determines that the Point or Order is not valid, the Chair will explain why. No debate is permissible.

### 2. Point of Information

A Point of Information is used to ask a question, not to offer information. This is frequently misused point by members attempting to jump the queue on the speakers’ list. When a member calls out “Point of Information,” the Chair will say, “What is your Point of Information?” The member may then direct a question through the Chair to a speaker or another member. There is no obligation to answer. If the speaker does not ask a question but instead proceeds to give information, the Chair can call the person “Out of Order,” and ask if they want to be on the speakers’ list.

### 3. Point of Privilege

This is used to draw to the attention of the Chair that the rights of a member at the meeting are being violated or to draw attention to something that is interfering with a member’s ability to participate in the meeting. Most frequently, the violation consists of remarks which attack the character of a member. It is perfectly permissible to criticize a member’s performance of responsibilities or abilities or competence. It is never permissible to attack a member’s character.

Violations may include:

- Calling a member a liar
- Saying or implying that a member is dishonest or has acted in an immoral or dishonest way

If the chair missed the comment or did not recognize the comment as offensive, any member, not just the impacted member, can raise a Point of Privilege. When the point is valid, the Chair should warn the violator, explaining what is and is not permissible.

A Point of Privilege can also be used to alert the Chair to a problem that must be dealt with immediately, i.e. that someone is wearing a scent contrary to HEU policy and is causing an allergic reaction.

#### **4. Challenge of a Ruling of the Chair**

The ability to challenge a ruling of the Chair is an important safeguard in democratic meetings. It exists not to undermine the chairperson, but to ensure that the will of the membership, not the judgement of a single individual, governs how business is conducted.

If a member believes the Chair has erred in a ruling, they may interrupt the meeting by saying, “I challenge the ruling of the Chair” or “I appeal the ruling of the Chair.” The challenge must be seconded to proceed.

When a challenge is raised, the Chair should respond, “The ruling of the Chair has been challenged. I will now turn the Chair over to the Vice-Chair and explain my ruling.” The Chair then briefly explains their reasoning, followed by the challenger explaining the grounds for their objection. No other member is permitted to enter into this debate.

The Acting Chair then puts the question to the membership, “Shall the ruling of the Chair be upheld? All those in favour? Opposed?” A simple majority decides whether or not they agree with the reasoning behind the Chair’s ruling.

The Acting Chair announces the vote result and turns back the chair. If the ruling is sustained, business proceeds. If the ruling is not sustained, the alternative procedure is applied. “For example, the Chair ruling that a close motion passed would be redone.”

It is important to understand that a challenge carries no personal criticism of the chairperson. It does not suggest the Chair is wrong or acted in bad faith. It simply means the membership wishes to proceed in a particular way.

## OTHER USEFUL MOTION AND POINTS

- **Motion to Receive or Adopt a Report:**

To “receive” indicates that a report has been heard and discussed, but does not indicate agreement with or support of the report.

If there are recommendations or actions to be taken in a report, there must be a motion to “adopt” or “endorse” the report and/or recommendations.

Alternatively, separate motions can be made after the Motion to Receive has been dealt with.

- **Motion of Reconsideration** (to discuss and vote again on a motion that has already been voted on):

1. Before a Motion of Reconsideration can be made, advance Notice of Reconsideration must be served.
2. After an adjournment (or at a following meeting):
  - A Motion of Reconsideration must be moved, seconded and carried by a 2/3 majority of those present.
  - Both the mover and the seconder of the Motion of Reconsideration must have voted with the majority on the original motion.
  - If carried, the original motion is back on the floor.

Keep in mind, no one is born with a perfect grasp of Parliamentary Procedure. The more meetings you attend and Chair, the more skills you will develop.



## SECTION FIVE

# Building Strong Locals

A strong local is, at its heart, a community. One built on trust, solidarity, and a shared commitment to the well-being of every member. It is built intentionally, over time, by leaders who are organized, engaged, and committed to their members. Building that sense of community relies on local executive creating a culture that is welcoming and inclusive, where new members are brought in with intention, where diverse voices shape decisions, and where leadership reflects the people it serves. It means being present in the workplace, not just at the bargaining table. Strong locals do not wait for a crisis to activate their membership. They invest continuously in relationships, education, and the kind of engaged, informed membership that can respond when it matters most.

This checklist will help you assess where your local is currently at and where it could be. Use it to set priorities, review your progress on an annual basis, and set realistic goals for the coming year. The checklist is not meant to be rigid — each local has its own strengths and challenges, and priorities for change will flow from your current reality.

## CHECKLIST

Check boxes and assess where your local is at each year.

### 1. Member Engagement

- Welcome and orientate new members to the union
- Hold regular membership meetings
- Talk to members in the workplace — know who they are and where they are
- Communicate regularly with members, face-to-face communication is a priority
- Circulate educational and other opportunities, and encourage members to attend
- Reach out to members from equity-seeking groups, younger members, various occupational groups, and all groups that make up multi-employer locals
- Seek out members' ideas for making meetings appealing and accessible; survey members on their interests and priorities

- Find creative ways to engage members — cultural activities, environmental or literacy projects, celebrations and socials that include members’ families
- Engage members in broader HEU campaigns
- Encourage members to participate in, discuss, and approve how their local rebates are spent
- Consider DEIA in everything the local does — from communications, events, and meetings, to deciding on priorities and strategies, and attendance at conferences and educational events

## 2. Strong Leadership

- Have a full executive, trained and confident in their roles
- Executive upholds the Constitution, HEU policies, and Local by-laws
- Make decision as an executive team and speak with one voice
- Support, respect, and trust each other to fulfill responsibilities; encourage individual skills and interests
- Continue to build leadership capacity through training and education
- Delegate tasks and share responsibilities among the leadership team and with other members
- Keep members at the centre of all decisions
- Actively seeks and encourages diversity on the Executive and steward teams
- Communicate respectfully and regularly
- Operate democratically
- Hold regular meetings of the executive, stewards, and committees
- Work well with Regional Vice-Presidents and servicing representatives
- Handle financial and other local affairs responsibly:
  - Develop budgets
  - Quarterly reports up to date
  - Keep meeting minutes and sign-in records safe and accessible at meetings
  - Annually review by-laws

## 3. Defend Members’ Rights and Resolves Disputes

- Determine how stewards are appointed and include a fair and consistent process in the Local by-laws
- Process grievances effectively
- Conduct health and safety inspections and resolve issues
- Work closely with servicing representatives
- Communicate regularly about grievances and health and safety issues to keep leaders and staff in the loop
- Listen to member concerns about the workplace and strategize on how to address them
- Let members know about grievance outcomes and monitor success
- Hold regular meetings of steward teams, health and safety committees, and labour-management committees — and keep minutes
- Know the local’s role in member-to-member conflict situations and what to do if issues arise
- Celebrate and thank the stewards Process grievances effectively

#### 4. Active in Union, Labour Movement, and Community

- Send full delegate complements to educational events, bargaining conferences, and the HEU convention
- Consider the union's strategic directions in decision-making
- Promote the union's campaigns and defend public health care and workers' rights
- Affiliated to local labour councils and are active the local labour movement
- Are active and involve members in broader union campaigns
- Participate in political action and elections
- Have strong community connections and work in coalition with school boards, municipal and provincial governments, and health boards
- Communicate regularly with members about HEU campaigns and other issues that affect them
- Are active on social justice and other important community issues
- Develop activism through membership education and training on community issues

### LOCAL PROJECT FUND

#### ARTICLE 2

### Initiation Fees, Dues & Temporary Dues Increases

#### Section B

**Rebates and Local Project Fund:** The Provincial Executive will establish each fiscal year an amount not to exceed One Hundred Thousand Dollars (\$100,000.00) to fund local projects, campaigns and Local Membership building.

Locals may make application to the Provincial Executive for access to this Fund.

The Provincial Executive will monitor the use of the Fund and the local shall be accountable for such usage.

Every local receives monthly dues rebates from the Provincial Office to support the day-to-day operations of the local. Most locals may also apply for the Small and Mid-Sized Local Supplement (SMLS) to help cover ongoing operational costs. Together, these funds support the regular work of running a local — member engagement, education, labour council affiliation, meeting costs, and building a reserve fund for possible job action.

But sometimes a local wants to do something more. A one-time investment in a specific project can dramatically strengthen a local's capacity, deepen member engagement, or address a challenge that routine operations haven't been able to solve. That is what the Local Project Fund is for.

The Provincial Executive (P.E.) established the Local Project Fund to help locals take on meaningful, targeted projects that build long-term strength. The fund is designed to break down the

barriers to activism — recognizing that in today’s environment, sustaining member engagement requires creativity, resources, and sometimes a dedicated push. The union wants to partner with locals to make this possible.

### **Example Project: Member Outreach and Local Mapping**

*Estimated duration: 6 months | Involves: 2 executive members on bookoff*

#### **WHAT IS THE LOCAL TRYING TO ACHIEVE?**

One of the most powerful things a local can do is simply show up — in the workplace, in person, and with genuine interest in what members need. Our members are spread across multiple sites, departments, and shifts who may not have met a union representative, have never seen their collective agreement, and don’t know when or where meetings are held. We seek to increase our presence and accessibility at every site to ensure members know that they have a say in their union and how they do that. We want members to know their collective agreement rights, how to enforce them, and who to contact if they need to file a grievance. We also want to increase member participation at local meetings to achieve quorum on a regular basis.

#### **EXPLAIN THE PROPOSED PROJECT TO BUILD YOUR LOCAL:**

Two executive members would be booked off one day per month, for six months, to conduct structured site visits across the local. The repetition will help build connections but also find different members. The goals of each visit would be to:

1. Map the local: Identify all worksites, departments, and shifts covered by the local, determine where members take their breaks and when they are most accessible, map the local so that communication networks can be developed and maintained
2. Increase contact and build relationships: Introduce themselves to members as their local union representatives, build trust and familiarity between the executive and the membership, listen to what members are experiencing in their departments and worksites, identify the issues, concerns, and priorities, and survey members on accessible meeting times and barriers.
3. Identify possible activists: Identify members who show interest or are respected by coworkers for future shop stewards, OHS stewards, site representatives to fill vacancies and for succession planning.
4. Distribute resources: Hand out collective agreements, local meeting information, and business cards with direct contact information for executive members and shop stewards.
5. Distribute bargaining surveys so members can share their workplace priorities
6. Build contact lists: collect emails and cell numbers to send meeting reminders and union updates.
7. Increase HEU branding in the workplace and give tokens of appreciation to members through lanyards, pins, and pens.

Every member who provides their contact information is entered into a draw for HEU gear, with a grand prize package including HEU merchandise and community gift certificates — making participation fun and rewarding. We will document what was learned at each visit: departments mapped, issues heard, contacts collected, leaders identified, and build a long term plan to address.

By the end of six months, the local will have a far clearer picture of who its members are, what they care about, and how to reach them. It will have laid the groundwork for stronger meeting attendance, a more representative steward structure, and a membership that feels seen and connected to their union.

## LOCAL PROJECT FUND POLICY

- Locals may make application to the Provincial Executive for funding assistance for local projects.
- Locals are responsible for filling out the Local Project Fund application form and providing details on the purpose of the project, including goals and objectives (what are you trying to achieve?), specific timelines (start and end dates) and a proposed budget.
- Locals are accountable to the Provincial Executive. On completion of a project or campaign, locals must report the results, both successes and shortcomings, including a final financial statement, within two (2) months of completion of the project. It is anticipated that the majority of projects would occur within a single fiscal year.
- Efforts will be made to accommodate as many locals as possible. More than one application per local may be considered, in special circumstances, but priority will be given to locals who have not previously received assistance within the current year.
- When applying for financial assistance, locals must also consider cost-share arrangements to assist with the campaign/project.
- Applications will be considered based on specific local needs that do not duplicate existing services, precedent setting issues affecting the local and/or initiatives that benefit the union province-wide. Projects could include a variety of things, such as:
  - Improving communication networks at the local level – finding out “how best to keep in touch”, or “what do members want to know?”
  - Finding ways to involve more members in various union activities and to keep them interested and engaged.
  - Implementing a mentoring system that will assist in developing the skills of new or young activists.
  - How to connect with the broader community and other organizations.
  - How your local can get more involved in your own community, maybe sponsor a sports team, help organize a Pride event, Red Dress event, collect food items for the local food bank, or plant an HEU community garden plot.

Initiatives should benefit your specific local and in turn, HEU as a whole. We encourage you to be as creative and imaginative as possible.

- Locals may request assistance from the Provincial Office in helping to design and implement a particular project, if needed.
- All local projects must receive prior, formal approval from the P.E. before they commence, and must not contravene the *Constitution and By-Laws* or any policies of the Hospital Employees' Union.

**Please note:**

- **Expenditures on an event that has already occurred prior to approval will not be reimbursed.**
- **The local portion of the cost share must be approved by the membership at a meeting with quorum.**
- **It is advisable to submit the application as early as possible as requests over \$1,000 must be approved by the Provincial Executive at a regularly scheduled meeting.**

Make it fun, celebrate your successes, and help build your local!

## **LOCAL PROJECT FUND APPLICATION**

For the current application form, visit [www.heu.org/local-executive-documents](http://www.heu.org/local-executive-documents).

Please submit completed applications to [heu@heu.org](mailto:heu@heu.org) or fax: 604-739-1510.

Sample form on next page.



## APPLICATION FOR LOCAL PROJECT FUND

---

Local Name: \_\_\_\_\_ Date of Application: \_\_\_\_\_

Explain the proposed project to build your Local:

\_\_\_\_\_

What is your Local trying to achieve?

\_\_\_\_\_

Proposed Start Date: \_\_\_\_\_ Anticipated End Date: \_\_\_\_\_

Who will be involved in the organization?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Positions held, if any, in the Local:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How many Members will be involved? \_\_\_\_\_

Is staff to be involved? How?

\_\_\_\_\_

Who else will be involved?

[Redacted]

Additional Notes

[Redacted]

**ESTIMATED COST OF PROJECT: (Budget)**

Lost Wages \_\_\_\_\_

Equipment \_\_\_\_\_

Supplies \_\_\_\_\_

Community Outreach/Advertising \_\_\_\_\_

Other Assistance requested (please be specific) \_\_\_\_\_

[Redacted]

Resources requested from the Provincial Office \_\_\_\_\_

[Redacted]

Total \$ \_\_\_\_\_ Cost Share Amount Requested \$ \_\_\_\_\_ % split \_\_\_\_\_

\_\_\_\_\_  
**Local Secretary-Treasurer - Print Name**

\_\_\_\_\_  
**Local Chairperson – Print Name**

\_\_\_\_\_  
**Local Secretary-Treasurer Signature**

\_\_\_\_\_  
**Local Chairperson Signature**

**FOR HEU HEAD OFFICE USE ONLY**

ACCEPTED or DECLINED: \_\_\_\_\_

DATE: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

## **SMALL AND MID-SIZED LOCAL SUPPLEMENT**

The Small and Mid-Sized Local Supplement (SMLS) is intended to assist small and mid-sized locals with ongoing costs which exceed the funds available to them through their monthly dues rebate.

The SMLS is being provided in recognition that small- and mid-sized locals do not benefit from economies of scale available to larger locals in their purchase of goods and services.

Eligible locals who meet the requirements for the SMLS will receive the \$1,500 annual payment. This is in addition to the local dues rebate.

The deadline for the SMLS application is June 30.

Local eligibility:

- 500 members or less (dues paying members as calculated by the Provincial Office based on payroll records).
- Submitted their first quarterly report for the year to the Financial Secretary.
- Include with application a copy of most current bank statement.
- Identify that the support is required.

Please note that the locals must apply annually to the SMLS. This supplement is not cumulative, locals cannot apply retroactively for the SMLS for previous years.

# SMALL AND MID-SIZED LOCAL SUPPLEMENT APPLICATION FORM

For the current application form, visit [www.heu.org/local-executive-documents](http://www.heu.org/local-executive-documents).



## SMALL AND MID-SIZED LOCAL SUPPLEMENT APPLICATION

The Small and Mid-sized Local Supplement (SMLS) is intended to assist small and mid-sized locals with ongoing costs which exceed the funds available to them through their monthly dues rebates.

The SMLS is being provided in recognition that small- and mid-sized locals do not benefit from economies of scale available to larger locals in their purchase of goods and services.

Eligible locals who meet the requirements for the SMLS will receive the **\$1,500 annual payment**. This is in addition to the local dues rebates.

The SMLS was established by delegates to the 202X convention of the Hospital Employees' Union.

**The deadline for the SMLS application is June 30 @ 5 p.m.**

Local eligibility:

- 500 members or less (dues paying members as calculated by Provincial Office based on payroll records).
- Submitted their first quarterly report for 202X to the Financial Secretary.
- Include with application a copy of most current bank statement.
- Identify that the support is required.

**Please note that the locals must apply annually for the SMLS. This supplement is not cumulative – locals cannot apply retroactively for the SMLS for previous years.**

### Provide the following information

Local Name		
Local contact address		
Local contact email		
Have you filed your first quarter financial report (from March 202X)?	Yes	No
Have you included your local's most current bank statement with this application?	Yes	No
Does your local require the small mid-size supplement to assist with ongoing costs?	Yes	No

Local Chairperson	Local Secretary-Treasurer
Name	Name
Signature	Signature
Date	Date

**Please note that both the chairperson and secretary-treasurer must sign this application**

#### Mail Form and documents to:

Hospital Employees' Union  
 Attention: Local Supplement  
 5000 North Fraser Way  
 Burnaby, BC V3J 5M3

**OR**

**Email to:** [Localsupplement@heu.org](mailto:Localsupplement@heu.org)

**DEADLINE JUNE 30, 202X**

**Please answer all questions and remember to include a copy of your local's bank statement.**



## SECTION SIX

# Local By-Laws

### ARTICLE 14

## By-Laws Covering Locals

### Section C

**LOCAL BY-LAWS:** Each local may adopt its own by-laws, which must be approved by the Provincial Executive and cannot conflict with the HEU Constitution and By-Laws.

**Local by-laws may include:**

- A minimum of four (4) Membership meetings a year.
- A local executive structure of fewer than the number of Officers as required in Article 15, Section A, and whether or not to elect alternates in case of vacancies. No Member shall hold more than one (1) office, except where the local has fewer than five (5) Members.
- The method for nominations, campaigns and elections of local executive officers.
- Eligibility requirements, if more than the Article 4 requirement.
- The method of filling vacancies that occur between elections.
- A steward structure.
- A requirement to adopt an annual budget detailing how rebates and any other income will be spent for meetings, travel, honorariums, education, donations and other costs.

Local by-laws are a collection of standing motions adopted by the membership at meetings with quorum. They establish how the local operates within the framework of the Constitution while allowing flexibility to reflect the unique structure, needs, and circumstances of the local.

By-laws provide stability, consistency, and transparency in how decisions are made and how the local functions between membership meetings. They ensure that important processes such as executive

structure, steward selection, elections, committees, and local operations are clearly defined and understood by both the executive and the membership. Well-written by-laws help prevent confusion, ensure fairness, and provide continuity as leadership changes over time.

Because by-laws are standing rules that guide the operation of the local, they are different from regular motions. A regular motion may direct the executive to take a specific action or spend funds for a specific purpose. A By-Law, or standing motion, is intended to remain in effect until the membership decides to change it. For this reason, by-laws should be written clearly, with enough flexibility to remain useful over time, but with enough structure to ensure accountability and consistency.

Creating, amending, or rescinding a By-Law requires a **Notice of Motion**. A notice of motion is when it is announced to the membership that a specific motion will be brought forward at a future meeting and it must be recorded in the minutes that this notice was given. This ensures members have time to consider the proposed change before it is debated and voted on. Because by-laws are significant and structural decisions, they should not be changed without proper notice and careful consideration.

All by-laws, and any changes to by-laws, must be approved by the membership at a meeting with quorum and then submitted to the Provincial Executive for approval to ensure they comply with the Constitution and union policies.

Local executives should review their by-laws after each election to ensure they remain clear, relevant, and reflective of how the local operates. This review often identifies gaps, outdated provisions, or areas where clearer direction is needed. Strong by-laws help executives do their work, help stewards and committees understand their roles, and help members understand how decisions are made.

Locals without by-laws are governed solely by the Constitution.

## **Creating or Updating Your Local By-Laws: A Step-by-Step Process:**

Building a set of by-laws is a carefully considered process that starts with what the local has already decided and builds towards a clear, current, and membership-approved document. Whether your local is creating by-laws for the first time or updating an existing set, the following steps will guide you through the process.

### **Step 1**

Start by going through all meeting minutes you have on file. You are looking for any motion that was intended to be ongoing. These are the standing motions that are the foundation of your by-laws. Record each one, including the date it was passed, so that it can be tracked back to the corresponding minutes if needed.

### **Step 2: Resolve conflicts between motions**

As you compile the list, you may find that a newer motion covers the same subject as an older one. Where this happens, the newer motion replaces the older. Be careful to ensure the new language addresses all elements of the previous motion so nothing is lost or left ambiguous.

### **Step 3: Address “Past Practice”**

Locals should never operate based on informal habits or traditions that were never formally passed as motions. These do not count. If something is not recorded as a standing motion passed at a meeting with quorum, it cannot be relied upon as policy. Where past practice reflects something the local genuinely wants to continue, pass a proper motion to formalize it.

### **Step 4: Review and assess each standing motion**

Once the full list is compiled, the executive should review each standing motion to ask: Is this still clear? Is it still relevant? Is it still what the membership wants? Some motions may need to be updated, combined, or removed. You may also identify gaps — areas where the local has no standing direction but needs one. Language matters and ambiguity or unclear language can lead to unintended interpretation and enforcement. Sending a draft for feedback from the President’s Office prior to passing at a local meeting can help prevent that.

### **Step 5: Provide notice of motion**

Because by-laws are significant and structural decisions, they cannot be changed without advance notice to the membership. Once the executive has prepared the draft, bring it to the next membership meeting and provide a notice of motion that the by-laws will be formally introduced and debated at the following meeting. This gives members time to review the document and come prepared to participate in the discussion.

### **Step 6: Debate and adopt a meeting with quorum**

At the next meeting with quorum, present the by-laws for debate. Members may propose amendments. Once debated and finalized, the by-laws are passed by motion. The adopted by-laws should explicitly state that all previous standing motions are null and void, replaced by this document, and that any future changes to the by-laws require a notice of motion.

### **Step 7: Submit to the Provincial Executive for approval**

All Local by-laws, and any subsequent changes, must be submitted to the HEU President and approved by the Provincial Executive to confirm they meet Constitutional requirements. Some provisions may not take effect until this approval is received.

### **Step 8: Keep the document current and accessible**

The Local by-laws must be present at every local meeting. After each local election, the newly elected executive should review the by-laws to ensure they remain relevant and aligned with how the local operates. Any changes follow the same process — notice of motion, membership debate, vote with quorum, and submission to the Provincial Executive for approval.

## **BASIC BY-LAWS**

All locals should have a basic set of *Local by-laws* that define key principles.

## 1. Executive Structure

Article 15 of the Constitution outlines the nine (9) positions that make up the executive, and if there are no variations in the *Local by-laws*, these positions must be elected every year.

Some positions are considered “optional”, but only with “approval of the local membership and the Provincial Executive”. That means these positions are required unless a motion is passed at a local meeting with quorum to remove them from the executive structure and the Provincial Executive has approved the exclusion. Please refer to Section 1, “Duties of Local Officers” to inform you about which are optional.

The local executive may also include other positions. Some locals represent members from different collective agreements or different facilities or sites, for example, and may want to have a site representative elected to the executive with voice and vote to ensure representation. Other options might be a position to fulfill a specific need on the executive, such as event planner or good and welfare representative. All added positions also need to be approved by the Provincial Executive.

Article 16, Section I states that a local may elect up to five (5) alternates that can fill in for any temporary vacancies. The *Local by-laws* can outline the number of alternates elected and the method which the local chooses to fill vacancies.

**Note: Permanent vacancies must be filled by an election at the next possible opportunity except for the Chairperson would be replaced by the Vice Chairperson and their vacancy would then be elected.**

## 2. Shop Steward and JOHS committee and Worker Health and Safety Rep

The Constitution provides limited direction on how Lead Shop Steward, the shop stewards and JOHS committee worker reps are to be selected. Article 14, Section B, states that shop stewards may be appointed by the local executive.

This reflects the long standing approach that best practice is for the local executive to appoint steward teams and designate a Lead Shop Steward. This allows the executive to work towards building a well-balanced team of knowledgeable and experienced stewards from diverse backgrounds, while also providing mentorship opportunities for succession planning.

However the local chooses its stewards, the by-laws should outline a clear, transparent and equitable process. A well-defined process builds member confidence by ensuring appointments are fair, consistent, and based on the needs of the membership.

The goal is to build a steward team with the skills, knowledge, and commitment necessary to enforce the collective agreement, support members, and help build a strong, organized workplace.

When determining qualifications or selection criteria for shop stewards, locals should consider assessing the following:

- Demonstrated commitment to union principles and collective agreement enforcement

- Ability to maintain confidentiality and exercise good judgement
- Strong communication and interpersonal skills
- Willingness to complete required steward training and ongoing education
- Ability to work as part of a team and follow union policies and direction
- Reliability and availability to perform steward duties
- Previous union involvement or activism
- Experience dealing with workplace issues
- Knowledge of collective agreement
- Experience in leadership, problem-solving, or conflict resolution

An Expression of Interest process is a valuable tool to learn more about interested activists and how their skills and experience can address gaps on the steward team.

When forming the steward team, the local should consider:

- Representation across worksites, departments, and shifts
- Continuity for members from one term to another
- Mentorship opportunities between experienced and new stewards
- Diversity and inclusion so the team reflects the membership

For Lead and Dedicated Shop Steward roles, which carry additional responsibility, locals should include clear additional criteria in their by-laws to reflect the scope of the role. This may include:

- Demonstrated leadership and organizational skills
- Significant steward experience or equivalent union experience
- Strong knowledge of the collective agreement and grievance procedure
- Completion of advanced steward training, where available
- Ability to mentor and support other stewards
- Ability to coordinate steward work and communicate with the local executive

In all cases, the protection and enforcement of members' collective agreement rights must remain the central consideration in steward selection and oversight. Stewards are accountable to the local executive and are expected to carry out their duties in accordance with the collective agreement, union policies, and established practices.

Stewards have a legal duty to represent all members fairly and without discrimination or bias.

It is important that the Lead Steward and executive regularly evaluates the effectiveness of the steward team. Where necessary, adjustments, including reassignment or removal, may be made to ensure the team remains functional, responsive, and aligned with member needs. Especially where stewards are elected, the local by-laws should outline a clear process for addressing performance or conduct concerns, consistent with the principles of natural justice and fairness.

### 3. The Method of Local Elections

A local may choose the standard election where each position is elected one by one in a single meeting, or a ballot box process, which allows for the election to take place over several hours, either by paper or electronic ballot, as outlined in Section 7. Where there is no existing by-law or a motion made 30 days in advance of election, the local may need to be directed by the Provincial Executive based on the individual circumstances at the local.

If there are specific parameters around how election campaigns can be run, “electioneering” rules must be in the *Local by-laws* or passed at a meeting with quorum 30 days in advance of the election.

### 4. Local Meetings

Holding local meetings monthly is ideal and you can read more about this in Section 1, “Membership Meeting Schedule”, but the Constitution, in Article 14, Section D, states: “Meetings may be suspended by the locals subject to the approval of the Provincial Executive with the exception of July, August, and December meetings which require approval of a regular local meeting only.”

This means that the local can suspend those three months by a motion at a local meeting, and anything beyond that must be approved by the Provincial Executive. The point of local meetings is to ensure members have the ability to receive and share information, so there must be very compelling reasons to override this.

Where there is no local by-law adopted, meetings are required to be held every month. As well, locals are not able to go more than three successive months without a meeting per Article 14, Section D, and this must be factored into the schedule.

## HEU LOCAL BY-LAWS TEMPLATE

For the current Local by-laws template, visit [www.heu.org/local-executive-documents](http://www.heu.org/local-executive-documents).

Please submit completed Local by-laws by email: [localdocuments@heu.org](mailto:localdocuments@heu.org) or fax: 604-739-1510.

## HEU LOCAL BY-LAWS EXAMPLE

### Executive Structure:

The local executive consists of the following:

- Chairperson (Table Officer)
- Vice-Chairperson (Table Officer)
- Secretary-Treasurer (Table Officer)
- Assistant Secretary-Treasurer (Table Officer)
- Alder Village Site Representative
- Senior Trustee
- Senior Trustee Elect
- Trustee
- Conductor
- Warden
- That the local elects up to three alternates to fill any temporary vacancies, excluding the chairperson, to be elected on one ballot, and the number of votes determine the order of alternates.

### Shop Stewards, JOHS committee and Worker Representatives:

- Shop Stewards shall be appointed by the local executive
- Process:
  1. After the annual local elections, the Executive will release an Expression of Interest inviting members to apply to be shop stewards and JOHS committee Representatives.
  2. In selecting Shop Stewards, the local executive shall consider the needs of the membership and the workplace and may consider the following qualifications and attributes:
    - Demonstrated commitment to union principles and collective agreement enforcement
    - Ability to maintain confidentiality and exercise good judgment
    - Strong communication and interpersonal skills
    - Willingness to complete required steward training and ongoing education
    - Ability to work as part of a team and follow union policies and direction
    - Reliability and availability to perform steward duties
    - Previous union involvement or activism
    - Experience dealing with workplace issues
    - Knowledge of the collective agreement
    - Experience in leadership, problem-solving, or conflict resolution
  3. Unless there are performance issues identified, existing stewards will automatically be re-appointed. Where additional stewards are desired and to ensure successorship planning, the Executive will assess the

suitability and needs of the local to ensure there is representation at all sites and that there are diverse backgrounds on the steward team.

4. Dedicated Shop Steward: The DDS will be the Lead Steward. An annual review of the DDS will be conducted and a selection by the steward team will be recommended to the Executive for final determination. Where possible the DDS requires:
  - a. Demonstrated leadership and organizational skills
  - b. Minimum two years steward experience or equivalent union experience
  - c. Strong knowledge of the collective agreement and grievance procedure
  - d. Completion of advanced steward training where available
  - e. Ability to mentor and support other stewards
  - f. Ability to coordinate steward work with the employer
  - g. Ability to communicate with the local executive and maintain strict confidentiality
- All Shop Stewards are expected to carry out their duties in accordance with the collective agreement, the Constitution, Local by-laws, and union policies and procedures, representing members fairly and without bias.
- The local executive shall regularly review the effectiveness of the steward team and may make changes, including reassignment or removal, where necessary to ensure effective representation of members. Any such decision shall be made in a manner consistent with principles of fairness and natural justice.

### **Local Elections:**

- At the meeting prior to the local executive nominations opening, a list of eligible members will be provided. The sign-in book will be available to check the eligibility list for accuracy. All discrepancies must be addressed prior to nominations opening and where necessary, consultation with the President will determine the final list.
- Nominations will be open for a minimum of 7 days.
- A non-candidate scrutineer will receive all nominations in writing.
- The local executive elections will be conducted by electronic ballot-box to conclude on the date of the regularly scheduled January meeting.
- Campaigning: Any candidate who wishes to run for the local executive may provide a 350 word-bio and photo which will be included on the electronic ballot. They may also provide a copy of their bio to the Local Scrutineer to be posted on the union board and local Facebook group. No other distribution of candidate materials will be allowed in the workplace and no soliciting for support shall be conducted on work time.
- Violations of campaign rules will be reported to the Elections Officer and to the HEU President. In the case of a significant violation, the local asks a committee of the Provincial Executive to make the determination of a candidates eligibility.

### **Local Meetings:**

- That the local meetings will be held at 4:30 on last Tuesday of every month, excluding July and August when meetings will not be held.

## **Budget:**

- That the local executive introduce an annual budget based on expenses and guidelines arising from the Local by-laws and foreseeable expenses for the year, at the regular February membership meeting.
- The annual budget must include the following and the budgeted amounts reviewed:
  - one \$50 Gift Certificate to the HEU Store as a door prize at each meeting
  - Up to \$100 on food and refreshments for local meeting
  - Table officers will receive a token honorarium of \$25 at the end of each month, excluding July and August, and during any executive officer's leave of absence for more than 30 days
  - HEU promotional materials and giveaways for the local's booth at the Annual Labour Day Picnic
  - A line item to cover HEU Day celebration
  - Annual Zoom subscription
- That the local provide retiring members, who have attended 50 per cent of local meetings in the year prior to retiring, which may include three (3) meetings and up to two (2) letters, with a gift valued up to \$50.
- That the budget includes the cost for one additional delegate to the HEU regional meeting, covering necessary wage replacement, shared hotel, mileage, and per diem as per HEU policy. The local executive will ask for an Expression of Interest and will determine who the attendees will be, ensuring that there is at least one new attendee.

## **Membership and Affiliation:**

- That the local pays each year the membership fee and donation of \$100 to the BC Health Coalition.
- That the local continue to be affiliated to the District Labour Council, pay all dues, and that the four (4) table officers are automatic delegates with remaining delegate allotments being decided by appointment by the local executive.

## **Donations:**

- That the local donate \$500 for bursaries each year, which will be administered by the Provincial Office.



## SECTION SEVEN

# Elections

### ARTICLE 4 Eligibility for Office

#### **\*Also see Article 14 Section C - Local by-laws**

No Union Member shall be eligible to hold office in the union or in a local, nor act as a Delegate of a local or of the union, unless the Member has attended a total number of meetings equal to at least fifty per cent (50%) of the regular local meetings, held by the local in the twelve (12) month period prior to nomination and has paid all union fines, dues and temporary dues increases. New Members who have attended 50% of local meetings since being hired are also eligible. If a meeting is called and there is no quorum, the Members attending can count such meetings in their total number of meetings attended during the twelve (12) month period. This provision does not apply to newly certified Members.

In the case of a Member being seconded to temporarily work at a different local than their original local or being permanently transferred to a different local, the Member can count attendance at regular monthly meetings at the former local towards fulfilling these eligibility requirements. This shall be limited to counting only one (1) meeting per month towards eligibility. Members who have permanently transferred can only be Delegates from the local at which they work. Members who are being seconded temporarily can be Delegates from their original or seconded local.

Notwithstanding the foregoing, a Member in good standing who submits written notification of legitimate absence, through sickness or having to work a shift, or on vacation, and on approval of the local executive, shall be credited with attendance, to the limit of two (2) such meetings in the twelve (12) month period, prior to nomination, insofar as the Member's right to hold office, or to run as a Delegate to Biennial Conventions.

This Letter of Notification must be in the local's possession within ten (10) days after the affected meeting. Any Member absent due to union business shall be considered as having attended the meeting.

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Further, notwithstanding the foregoing, a Member may be a Delegate to the regular Convention of this union, providing the local to which the Delegate is attached has been in existence less than twelve (12) months.

An eligible Member who is absent for cause and not at the regular monthly meeting for nomination who is willing to run for office must indicate their willingness in writing to the local executive prior to nomination. A text message and/or email will be accepted as a written request. In the election of Local Officers, if a position is vacant and no eligible Member is willing to accept nomination, then that position may be filled by acclamation or by election.

A nomination cannot be accepted for an ineligible Member for a position where an eligible Member is nominated and accepted.

## ELIGIBILITY

This interpretation provides practical direction on how Article 4 may be applied, including clarity for members who work in more than one local, based on the existing language in the Article. Its purpose is to ensure fairness, consistency, accuracy, and transparency across all locals in its application.

Note that this interpretation does not supersede the HEU Constitution and By-Laws as it is meant to provide guidance on the application of Article 4. If a conflict arises through the application of this interpretation and the HEU Constitution and By-Laws, the HEU Constitution and By-Laws will take precedence. This interpretation is subject to change in accordance with any amendments made to the HEU Constitution and By-Laws.

### 1. What “50% of meetings” really means

To be eligible, a member must have attended at least half of the regular monthly local meetings held in the 12 months immediately before the nomination meeting.

- Members must have attended at least half of their regular monthly local meetings in the 12 months before the nomination meeting, excluding the election meeting itself. Eligibility must be determined before nominations open.
- Only regular monthly meetings count. Special meetings do not count.
- Meeting attendance counts even if quorum is not reached.
- For new members, the 50% calculation begins with the first regular meeting after their hire date.
- Newly certified locals do not need to apply eligibility requirements in the year they are established as a new local.

## 2. Letters of legitimate absence (Regrets)

- Members can receive credit for up to two missed meetings per year when they submit a letter of regret for illness, work obligations, or vacation, approved by the local executive.
- Regrets must be submitted before the meeting or within 10 days after the missed meeting.

## 3. Absences due to union business

- If a member is absent because they were conducting union work or education, they are automatically credited attendance. This applies to all meetings missed regardless of how many. Though a written notice is not required by the Constitution and By-Laws, members are strongly encouraged to submit a brief written notice so that records are clear and easily verifiable if needed.

## 4. Members holding positions in more than one local

- Where a member holds more than one position, whether permanent or casual, represented by different locals, the member may be a delegate or run for a position in either local only under the following circumstances:
  - i. The member verifies that they have worked at the site associated with the local they wish to run for within the last 12 months; and
  - ii. They meet eligibility requirements for that local.
- “In the case of a member being seconded to temporarily work at a different local than their original local, or being permanently transferred to a different local, the member can count attendance at regular monthly meetings at the former local towards fulfilling their eligibility requirements.” It is understood that:
  - i. Secondment occurs when the employer temporarily assigns an employee to a new position at another site that is represented by a different local. This does not include redeployment for the purposes of filling a vacant shift.
  - ii. In the case of secondment only, the following rules shall apply:
    1. Members who have permanently transferred can only be delegates from the local at which they currently work;
    2. Members who are being seconded temporarily can be delegates from their original or seconded local;
    3. The member must arrange notification of meeting credits between the local executives prior to the nomination process. If not provided in time, eligibility will NOT be adjusted afterward because it may affect who can run; and
    4. They may only receive up to one meeting credit per month, even if they attended both local’s meetings.

## 5. Ineligible candidates for local executive positions

- If no eligible member is willing to accept a nomination for a local officer position, then an ineligible member may run and may be acclaimed or elected.

- But if even one eligible member accepts a nomination, then no ineligible member may run for that position.
- This exception only applies to local executive positions.

## **6. Delegate elections**

- A member must meet eligibility requirements to be elected as a delegate to conventions or bargaining Conferences.

## **9. Local By-Laws**

- Article 14 allows for a local to adopt a by-law that has additional eligibility requirements but may not be less than. The only way to change Article 4 is through a constitutional amendment at HEU Convention.

## LOCAL EXECUTIVE ELECTIONS

### ARTICLE 15

## Nomination & Election of Local Officers

### Section A

**LOCAL OFFICERS:** The Officers of the local shall consist of Chairperson, Vice-Chairperson, Secretary-Treasurer, Assistant Secretary, Conductor, Warden, three (3) Trustees and, in the event of merged locals, such other Local Officers that ensure worksite executive representation.

Individual locals may vary their Executive structure subject to prior approval of the Provincial Executive.

**\*Also see Article 14 - Section C.**

### Section B

#### **NOMINATION & ELECTION OF OFFICERS:**

- a) The nomination and election of Officers shall take place no later than April 30 in the calendar year, by secret ballot, as determined by the Local by-laws or at any meeting with quorum that provides for 30 days' notice of election; or as prescribed by the Provincial Executive.
- b) The timelines in Article 15 Section B Subsection a) above do not apply to newly organized locals within the first 12 months of their establishment.

### Section C

**SCRUTINEERS:** Prior to the election, and with the approval of the meeting, the Chairperson shall appoint non-candidate scrutineers to take charge of the ballot box, count the ballots and report results to the Chairperson.

### Section D

**ELECTIONEERING:** Only information electioneering shall be used in any local election. The method and medium of this information shall be restricted within the confines of each local as determined in the Local by-laws, or agreed to by the membership at a previous meeting with quorum that provides 30 days' notice to the election. Any violation of this clause shall nullify the violating candidate's eligibility.

### Section E

**TERMS OF OFFICERS:** The terms of the elected Officers shall expire immediately following the installation of Officers at the Annual General Meeting at which their successors are elected and qualified, PROVIDED HOWEVER, that at the Annual General Meeting the Trustee receiving the highest number of votes shall serve a two (2) year term, the other shall serve a one (1) year term. At each succeeding Annual General Meeting, two (2) Trustees shall be elected, the one receiving the higher number of votes to serve the two (2) year term.

Election of local executive officers must be conducted by secret ballot, and carried out between January 1st and April 30th each year, usually on a day of a regularly scheduled meeting. In preparation, the local will need to consider how they want to run the elections long before they occur.

The Constitution requires that **motions governing elections must be made** at least 30 days in advance of the election, unless there are existing standing motions in the *Local by-laws* or as prescribed by the Provincial Executive. These options include:

- Election process
- Campaign rules

The in-person, standard election process has the elections occurring during a meeting with quorum. It is simple, candidates are easily able to “run down” for each position, and the results are immediate.

However, sometimes achieving quorum for valid elections can be challenging and unless a member is available to attend the meeting, they are unable to participate in the local’s democratic process.

Some locals opt to use a ballot box election process, which allows their members the ability to vote over an extended period of time, covering a variety of shifts, and perhaps even at various locations, or by a virtual ballot. This provides members more flexibility and opportunity to participate in the election.

Where necessary, or where there is no by-law or motion on record, the Provincial Executive will work with the local to determine the most democratic way to hold the election. The PE member will ensure that the process is constitutional and fair.

**Note: However the election is conducted, the votes must only be cast by secret ballot. Voting process must be either in-person or electronic ballot; no hybrid voting without the approval of the PE member assisting the election.**

All documents required for an election can be found on the HEU website.

## ELECTIONEERING

Electioneering means campaigning for elected office on behalf of yourself or someone else. Campaigning may include putting up posters, distributing leaflets and fundraising. The membership can decide what expectations or limits can be used in local elections, which may include a timed speech, posters on the union board or local’s social media, leaflet distribution, fundraising, etc. (See by-laws, Section 6 for an example).

## STANDARD ELECTION PROCESS

### PRIOR TO THE MEETING:

1. Notify Election Officer of the date, time, location and process to be used as soon as possible. This person should be someone impartial, such as the Regional Vice-President or staff

representative assigned to your local, or another Provincial Executive member. They will ensure the election is conducted fairly and that the local has all of the materials and support required to prepare for the meeting.

2. Determine Nomination process:
  - In-person or virtual election meeting: Nominations are made at the election meeting and members unable to attend for legitimate reasons may submit their nomination in writing at any time before nominations close. Election day notice is all that is required; and/or
  - Nomination period: Self-nominations may be submitted for in-person over a designated period of time.
3. Determine the list of eligible members from the attendance book from the last 12 months.

#### **AT THE MEETING:**

1. A list of eligible members and the attendance book must be available by the local at the start of the meeting.
2. A copy of written self-nominations from members, who are legitimately absent from the meeting, must be available.
3. Provide a list of the positions requiring an election, and the *Local by-laws* which outline approved structure must be available.
4. Elections Officer will take the chair and call for scrutineers before the election. Scrutineers will be instructed to distribute, collect, count ballots privately, and report the results.
  - Scrutineers must not be running for any executive position. If a scrutineer changes their mind and decides to run for an executive position, then the chair should ask for a volunteer to replace that scrutineer. The new scrutineer continues for the remainder of the elections.
  - Ideally, there should be an odd number of scrutineers (3 or 5) in case there are any disputed ballots.
  - The membership should approve the appointment of scrutineers by motion.
5. Elections Officer will “open the floor” for nominations for each executive position from members in attendance. The names of those nominated should be written on a board or sheet of paper at the front of the room, in the order they were nominated.
6. Elections Officer will add any self-nominations submitted in writing.
7. Elections Officer will ask those nominated if they are willing to stand for office, in reverse order. Self-nominated members are automatically considered accepted.
8. If more than one eligible member accepts nomination, an election is required by secret ballot.
  - If there is only one eligible member accepting nomination, they are declared elected by acclamation.
9. If there are no eligible candidates running for the position, the election is open to ineligible members.
10. When an election is required, the Elections Officer will call for the doors to be tyled. To protect the integrity of the vote, the warden can allow people to leave while members are casting their ballots, but cannot let anyone enter. **Note: Quorum needs to be maintained in order for any election to proceed.**

11. Elections Officer to instruct members to stay seated and quiet during the vote, fill out their ballots, fold in half, raise above their heads if able, or otherwise indicate they are done.
12. The scrutineers distribute ballots.
13. Members vote, including the scrutineers and all executive officers.
14. Scrutineers collect the ballots.
15. Elections Officer calls for the doors to be opened (untiled).
16. Scrutineers count the ballots privately and provide the results to whoever is chairing the meeting to announce. It is strongly suggested that only the name of the successful candidate is revealed, not the full voting results.
17. Repeat Steps 5-16 as required.
18. Trustee Election:
  - Both (or all three if necessary) trustees are elected on one ballot.
  - Trustees are nominated for both positions.
  - Each member will vote for up to the number of trustees required (2 or 3).
  - The candidate with the most votes will be awarded the 2-year term.
  - The next candidate(s) will be awarded the 1-year term(s).
  - Where candidates are acclaimed, there should be an election or process to determine who will receive the 2-year term.
  - A run off vote may be required in the case of a tie.
19. A motion to destroy the ballots should be passed.
20. The new executive members take the *Oath of Installation*, Article 17.

## VIRTUAL BALLOT BOX ELECTION PROCESS

### PRIOR TO ELECTION:

1. An executive meeting should be called well in advance of the elections to determine:
  - The time-period that nominations will be accepted and how members can submit nominations.
    - Nomination Period: Self-nominations may be submitted for virtual ballot box election over a designated period of time; and/or
    - Nomination meeting: Nominations may be made at a in-person or virtual meeting in addition to accepting written self-nominations.
    - **Note: Members seeking election can have their name stand for more than one position. HEU's tradition allows for candidates to run for another position if defeated; in other words, to "run-down." Candidates wanting to run for more than one position must identify their intentions for each individual position in order to have their names included on the ballot. However, the first position the member is elected to is awarded, and the member's name will be removed from all subsequent ballots.**
  - Set the election date, times during regular Provincial Office hours.
    - The recommended time will be a 24 hour voting window to vote online. This will ensure that every shift is able to vote.

- Consider organizing the ballot to close just prior to a scheduled local meeting where the results can be announced and the new executive sworn in.
  - The local must provide at least 10 days advanced notice of election to members.
  - Leave 2 – 3 days between close of nominations or nomination meeting and the election for preparation of the ballot.
  - Notify the HEU President’s Office of the date and time of the election.
  - **The executive MUST notify the HEU President’s Office and the Elections Officer of the Election Day details – including date, times, locations, and that the election will be conducted by virtual ballot box.** The Elections Officer should be someone impartial such as the regional vice-president or staff representative assigned to your local, or another Provincial Executive member. They will ensure the election is conducted fairly and that the local has all of the materials and support required to prepare for the meeting.
  - A scrutineer is appointed by the executive, who will be responsible for collecting nominations, determining members’ eligibility, and contacting nominees to ask if they wish their name to stand. Scrutineers cannot be a candidate for any position and can be the RVP or staff representative. A motion should be made when possible to approve the scrutineer(s).
  - The warden, or designate, provides the scrutineer a list of eligible members who have attended 50 per cent of the regular meetings held in the 12 months preceding the election.
2. Dates and times for the nomination meeting and notice provided for the election day voting period must be clearly stated and posted at least seven (7) days in advance.

**AT THE CLOSE OF NOMINATIONS, THE SCRUTINEER WILL:**

1. Compile the list of nominees and reviews the list against the eligibility list of members. If no nominee is eligible in a single position, then the nomination is open to ineligible nominees.
2. If there is only one candidate that is eligible or is running for that position, they are acclaimed, and an election for that specific position is not necessary.
3. Notify the chairperson and the Elections Officer of the list of acclaimed candidates and each candidate for contested positions.
4. Post the list of candidates (optional).
5. Scrutineer or Elections Officer will notify the HEU President’s Office ***at least 2 days in advance of the election with the following information:***
  - Date and time of vote.
  - Candidate Names and contested positions they are running for.
  - All acclaimed candidates and their positions.
  - Name and contact of the Scrutineer and Elections Officer.
  - How many trustees are required to be elected.

**ELECTION DAY – VIRTUAL**

1. Members will be emailed and texted a link to the Simply Voting website with their personal log in information.

2. Results will be sent to the Scrutineer and Elections Officer.
3. Chairperson will be notified of the results.

The election must have more ballots cast than the local's required quorum to be valid. For example, if the local's quorum is 25, they will need 25 or more votes cast.

## NEXT LOCAL MEETING

- Some locals will arrange to have this meeting shortly after the count is conducted to announce the results and swear in the new executive.
- A motion to destroy the ballots should be made.
- The new executive will need to be sworn in.
- Any unfilled positions, or if there is a tie, an election should be held at the following, regular local meeting with quorum.

## NEXT STEPS

- Complete and submit the Local Officer Form, available on the website under local elections, for each member of the executive.
- If there is a change in executive, all equipment, documents and information must be provided to the incoming executive members.
- Chairpersons, Vice Chairpersons, Secretary Treasurers, and Assistant Secretary Treasurers who have not received Table Officer Training should apply as soon as possible.

## INSTALLATION

### ARTICLE 17 INSTALLATION

*Chairperson or Installing Officer: "Fellow Members, repeat after me the following obligation."*

*"I, \_\_\_\_\_, sincerely pledge that I shall truly and faithfully and to the best of my ability perform the duties of my office for the ensuing term as prescribed in the Constitution and By-Laws of this union and, as an Officer of this union, shall at all times endeavour, both by my counsel and example, to promote the harmony and preserve the dignity of its sessions.*

*I further pledge that, at the close of my official term, I shall promptly deliver any monies or property of the union in my possession to my successor in office."*



## SECTION EIGHT

# Union Committees

### LOCAL COMMITTEES

The chair and executive at the local level should look at delegating work by appointing committees. One major advantage to working in this way is to ensure workload and knowledge are shared and distributed with the local membership.

The chairperson is ex-officio to all local committees. This means that, by virtue of your position as chairperson, you automatically have membership on all committees of your local, but you don't necessarily need to participate. You do need to be aware of what the committees are working on, and should receive and review all committee minutes.

Your local may want to consider setting up a number of subcommittees. This is only a guideline, and your local may have members who are interested in setting up these or other committees that are suited to your local.

If your local would like assistance with setting up an equity committee, or if you have any issues or concerns regarding equity, please contact the Provincial Office to speak with one of our equity officers.

It's important that Provincial Executive (P.E.) committee work at the provincial level is supported at the local level. Below is a list of the current P.E. subcommittees.

- Environment
- Global Justice & Peace
- Men's
- Occupational Health & Safety
- Retirement and Pensions
- Political Action

There are also committees that are negotiated in collective agreements. HEU currently has more than 100 different contracts, so you should consult with your staff representative on what committees are required for your local. Some of the committees that fall under this category are:

- Shop Steward
- OH&S
- Essential Service
- Classification
- Workload
- Return-to-Work
- Contracting-In

## **EQUITY STANDING COMMITTEES**

Under Article 13 of the *HEU Constitution and By-Laws*, there are seven (7) equity standing committees. You are strongly encouraged to set up committees that support the equity standing committees and their initiatives. At minimum, as a chairperson, you must be aware of how members in your local, who are part of these equity groups, can contact their provincial committees.

### **1. Ethnic Diversity:**

One union, many colours! A true measure of the strength of a union is the diversity of its membership. The Ethnic Diversity Standing Committee uses education and action, at the workplace and within our union, to raise awareness that there is unity in diversity.

The committee aims to break down barriers to develop a better understanding among HEU members by educating each other on the diversity of their backgrounds, and raising awareness about the physical, emotional and mental hazards of racism and discrimination.

### **2. Indigenous Peoples:**

The Indigenous Peoples Standing Committee seeks to educate all HEU members, and raise awareness about Indigenous culture and issues within the union. Any Indigenous member (off- or on-reserve, status or non-status) is welcome to participate in this committee.

The committee is actively involved in a number of campaigns and events that raise awareness about Indigenous Peoples, including Orange Shirt Day, which draws attention to the atrocities of Canada's residential school system; and the Red Dress Campaign to recognize missing and murdered Indigenous women and girls.

### **3. People with Disabilities:**

The People with Disabilities Standing Committee is for HEU members who are disabled and working, on long-term disability (LTD) or receiving WorkSafeBC benefits, or on an extended medical leave.

Disabilities can be physical (i.e. sight, hearing, mobility) or invisible (i.e. mental health, addiction or chronic pain).

The committee promotes the contributions of workers with disabilities, advocates for improvements to disability benefits and resources, as well as accessibility.

#### **4. Pink Triangle:**

The Pink Triangle Committee works to improve and enhance awareness of lesbian, gay, bisexual, transgender, two-spirited, intersex, queer and questioning members of our union. It provides a networking support system to guarantee HEU members have a safe, positive and harassment-free workplace.

The committee's main goal is to eliminate homophobia and transphobia, and address oppression.

#### **5. 2-Spirit, Women & Non-Binary:**

The 2-Spirit, Women and Non-Binary Standing Committee works with grassroots feminist organizations, community coalitions, and other trade union committees dedicated to social and economic equality and the advancement of women and gender rights.

The committee actively participates in a number of campaigns and events to promote women's equality, including affordable child care, and the Red Dress Campaign, and volunteers their time to provide support and resources to women on Vancouver's Downtown Eastside.

#### **6. Young Workers:**

The Young Workers' Standing Committee engages with young workers (aged 33 and under) to revitalize the union; raise awareness among all HEU members of youth issues; educate non-union and unemployed youth about the labour movement, social justice issues, and their rights; and identifies and develops action plans on issues affecting young workers.

#### **7. Older Persons:**

The Older Persons Standing Committee raises awareness of issues affecting members later in their careers and into retirement, including pensions, retirement security, and age-related discrimination. The committee promotes the continued involvement of older members and works to ensure their perspectives are reflected in the union's work.



SECTION NINE

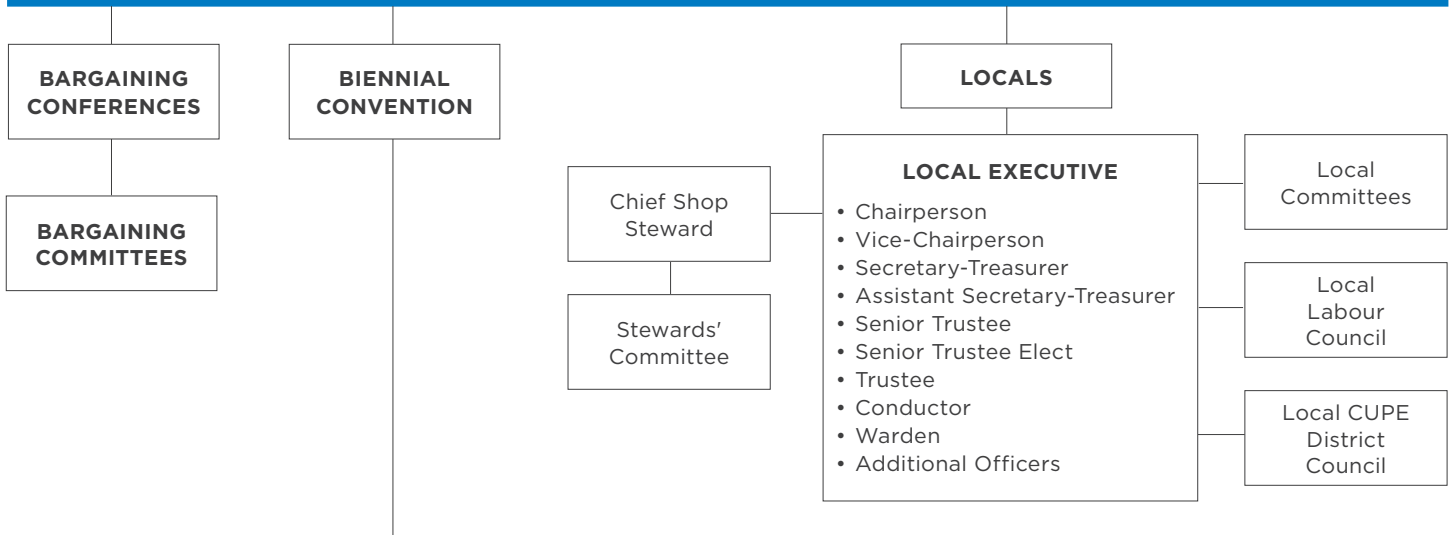
# HEU Organizational Charts

(See next page for political structure and operational structure charts)

# HEU Political Structure



## MEMBERSHIP



## PROVINCIAL EXECUTIVE (28 MEMBERS)

- President
- Secretary-Business Manager
- Financial Secretary
- Vice-Presidents (1st, 2nd, 3rd)
- Senior Trustee
- Senior Trustee-Elect
- Trustee
- Regional Vice-Presidents:
  - » Vancouver Coastal (3 representatives)
  - » Fraser (3 representatives)
  - » Vancouver Island (2 representatives)
  - » Interior (3 representatives)
  - » Northern (2 representatives)
- Diversity Vice-Presidents:
  - » Indigenous Peoples
  - » Ethnic Diversity
  - » Pink Triangle
  - » 2-Spirit, Women and Non-Binary
  - » People with Disabilities
  - » Young Workers

### EQUITY STANDING COMMITTEES

- Ethnic Diversity
- Indigenous Peoples
- People with Disabilities
- Pink Triangle
- 2-Spirit, Women and Non-Binary
- Young Workers

### PROVINCIAL EXECUTIVE SUBCOMMITTEES

- Environment
- Equal Opportunities
- Global Justice & Peace
- Men's
- OH&S
- Political Action
- Retirement & Pensions

### CUPE NATIONAL

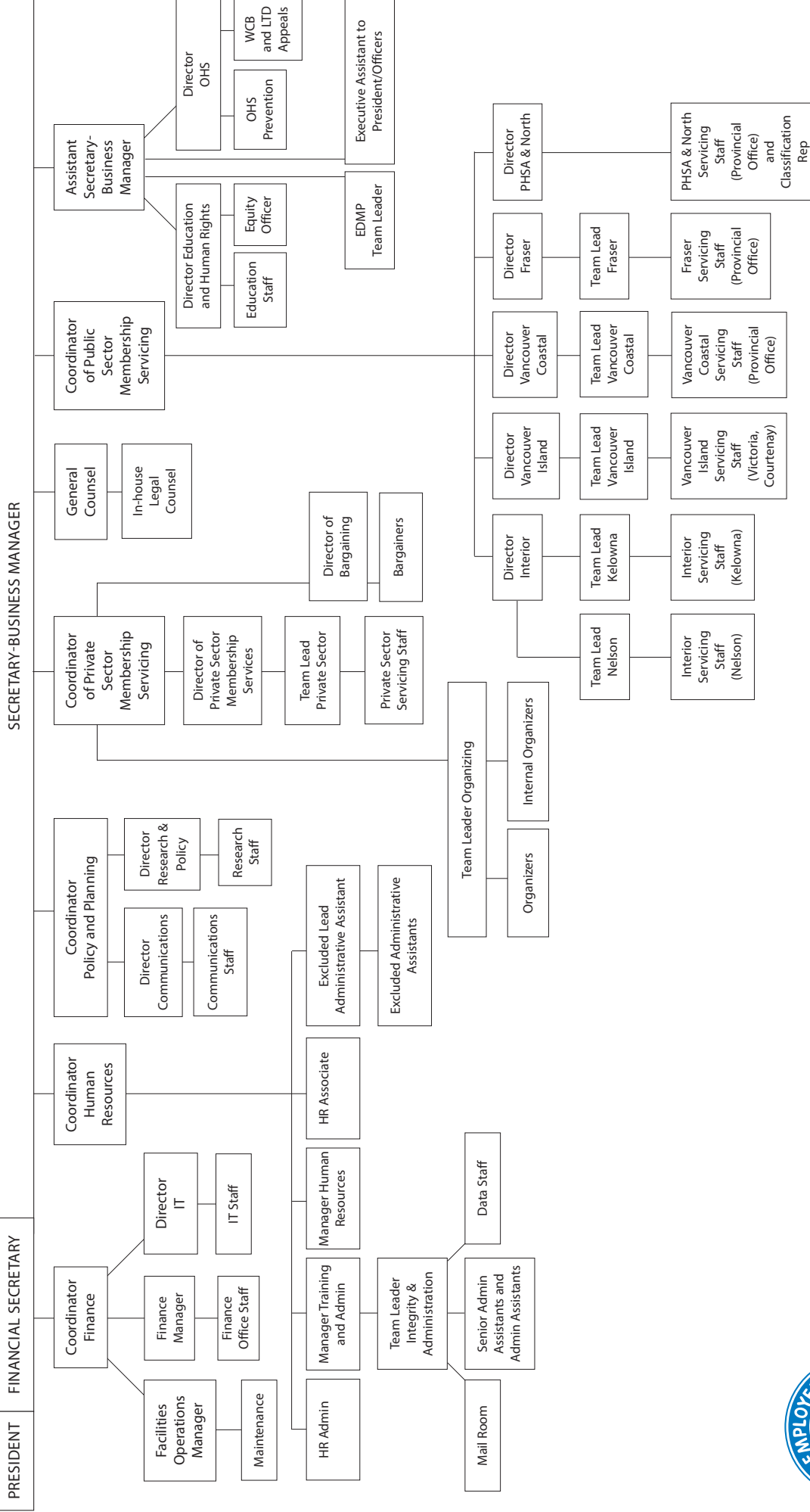
- Executive Board
- National Committees/ Working Groups
  - Aboriginal Council
  - Child Care
  - Contracting Out and Privatization
  - Environment
  - Global Justice
  - Health & Safety
  - Health Care Issues
  - Indigenous Council
  - Literacy
  - Pensions
  - Persons with Disabilities
  - Pink Triangle
  - Political Action
  - Rainbow
  - Women's
  - Young Workers

### REPRESENTATIVES TO OTHER LABOUR ORGANIZATIONS

- B.C. Federation of Labour
  - Officers
  - Executive Council
- B.C. Fed committees
  - Climate Change and Structure
  - Human Rights
  - OH&S
  - Political Action
  - Women and Gender Rights
  - Young Workers
- CLC Working Groups
  - Women's
  - Young Workers

# HEU Operational Structure

## ADMINISTRATIVE COMMITTEE





## SECTION TEN

# Education

Education is key to a successful local. The local executive should help all activists and members access information and dialogue with other activists within HEU, other unions, the broader labour movement, and community groups.

HEU holds many educational opportunities which are open to all members. Information about these courses are included in the secretary-treasurer mailings and should be posted on union boards. Information can also be found on the HEU website and on HEU's Facebook and Instagram page(s).

Here are some workshops and training that HEU has offered:

- Table Officers' Training
- Shop Steward Workshop (Level 1 and 2)
- New Certifications Shop Steward Training
- Intermediate Shop Steward Workshop "Know and Enforce your Rights"
- Lead Shop Steward Workshop
- Dedicated Shop Steward
- Occupational Health & Safety Workshops (Introductory & Advanced)
- Demystifying Classifications Workshop

- Supervisors Workshop
- Workload Workshop
- Workplace Mental Health Workshop
- Human Rights and the Duty to Accommodate Workshop
- Anti-Racism Workshop
- Building Organizing Capacity
- Getting Involved Workshop
- Women in Leadership Workshop
- Women Breaking Barriers Workshop
- Introduction to Equity Workshop
- Introduction to Human Rights
- Truth and Reconciliation Workshop
- Domestic Violence at Work Workshop
- HEU Solidarity and Inclusive Leadership Training
- Member Facilitator Training
- Cultivating Space for Women of Colour Leadership
- Transforming Conflict into Union Activism
- Tips for Trustees
- Workers Rights Wednesday
- HEU in Your Own Language

Educational opportunities offered by the B.C. Federation of Labour and the Canadian Labour Congress are advertised in BCFL and HEU bulletins, and are often included in HEU's secretary-treasurer mailings. They may include:

- Conferences and Workshops
- CLC Pacific Region Winter School
- Health and Safety
- Young Workers' Retreat

Members may be eligible for reimbursement of up to \$350 per year for registration fees related to their labour studies.



## SECTION ELEVEN

# Communication, Getting Our Message Out

Maintaining open communication within your local and externally is an important job for you as chairperson. As chairperson, you can build the profile of your local and help set the standard for HEU as the “Heart of Health Care”. There are many ways to do this. Here are a few ideas for building participation and raising the profile of your local.

## SOCIAL MEDIA

Social media is a powerful tool for building community, connecting with members, and amplifying the work of your local. HEU has a robust and engaging social media presence including Facebook, Instagram and Tik Tok (search for Hospital Employees’ Union). These channels are a great source of information for educational opportunities, campaigns, and upcoming events.

Locals are also encouraged to use social media as a way to connect with members. It can be used as a “union board” for sharing HEU posts, posting meeting notices, for promoting union activities, and celebrating members at local events (always with permission before posting photos).

A closed Facebook group, where members invite other members, can be particularly effective for building a sense of local community and keeping members informed between meetings.

With that opportunity comes responsibility. Any social media platform associated with the local must be actively monitored by an administrator. Confidential information must never be shared. Member interactions must be respectful at all times, and content that is discriminatory, harassing, defamatory, or contrary to HEU policy must be removed immediately.

## Using the HEU name or logo

If your local wants to use the HEU name or logo on a social media platform, prior approval is required from the HEU Social Media Committee. Applications must include a description of the proposed use, the names and contact information for all administrators and moderators, and a signed agreement to monitor content, respond to complaints, remove content that violates policy, and cease use of the name or logo if requested by HEU.

## HEU BOUTIQUE

Locals can order a variety of items, such as HEU banners, signs, T-shirts and flags to show union pride and solidarity from the HEU Boutique for:

- Demonstrations
- Marches
- Rallies
- Picket support
- Community events
- Local meetings

## SOLIDARITY

Write letters of support and sign petitions about issues that your local is passionate about, and encourage other local executives, activists and members to do the same. Possible letter topics might include:

- Support for other unions
- International solidarity issues
- Social causes
- Women's issues
- Letters to the Editor of local newspapers: on privatization, Medicare, pensions, Employment Insurance (E.I.), child care.

## OUTREACH AND BUILD ALLIANCES

Outreach and build alliances with other unions and progressive organizations. Find out who is taking action in your community about issues that are important to your local. Possible alliances might be built with:

- Labour councils
- Political parties (promote our issues)
- Community organizations and coalitions
- Seniors' groups

## HIGHLIGHT HEU CAMPAIGNS AND EVENTS

To highlight HEU campaigns and events, sponsor or acknowledge HEU campaigns and events such as Care Can't Wait and HEU Day (October 13).

Hold picnics, events, dinners or dances to mark or celebrate special occasions in your community and around the world. If you can't gather in person, hold a "social hour" online. Encourage members to attend activities hosted by other unions, labour councils and progressive organizations. For example, many organizations hold events to mark International Women's Day, May Day, Labour Day, and Pride events.

## **PRIVACY AND MEMBER INFORMATION**

In the course of local business, you may collect information from members, including their contact information. Locals have a responsibility to keep this information secure and ensure it is not used for purposes that were not clear to members when it was collected. It's important that you do not provide membership information to outside organizations, including political parties or to community groups. Unless they're conducting business of the local, this data should not be given to members either.

## SECTION TWELVE

# Parliamentary Procedure Glossary

## A

### **Abstain**

Decline to vote on a question or motion.

### **Acclamation**

When someone wins election because there are no other candidates.

### **Ad hoc**

A temporary committee, set up for a specific purpose; it ends when its work ends.

### **Adjourn**

A motion to end the meeting.

### **Adopt, adopt a report**

Accept a motion; accept a report, including actions described in the report.

### **Affirmative vote**

A vote in favour of the motion.

### **Alternate**

A member who substitutes for another member.

### **Amendable**

A motion that can be changed (amended).

### **Amendment**

A motion that proposes a minor change to a motion without changing the intent.

### **Appoint**

Name or assign a person to hold a position or be part of a committee.

### **Approve**

Confirm, authorize.

### **Assembly**

A meeting or larger gathering; a group of people gather to discuss issues and make decisions.

## B

### **Ballot vote**

A secret vote on paper; the meeting collects and counts the ballots and announces a final count.

### **Business**

Items that come before a meeting.

### **By-Laws**

The rules that apply to the operation of your local union, as approved by the Provincial Executive.

## C

### **Caucus**

A meeting of a sub-group of members to discuss and plan an issue or motion.

### **Chair**

The person who leads a meeting, also known as a Presiding Officer.

### **Challenge to the Chair**

During a meeting, an appeal of a decision that the chair made.

### **Close debate**

The chair stops discussion on a motion.

### **Close nominations**

The person in charge of elections at a meeting ends the part of the election that allows members to nominate candidates to a position.

### **Committee**

A person or group of people that the local appoints or elects to investigate, recommend, or act on an issue.

### **Committee report**

When a committee provides details on its work to the local's executive and members.

### **Counted vote**

A vote where members raise their hand or stand; different from a ballot vote.

## D

### **Debatable**

Motions that members at a meeting can discuss and question.

### **Debate**

The time set aside for members to discuss, question and argue on a motion.

### **Dispose of (a motion)**

When members are finished with a motion; when members at a meeting have voted on a motion. See Reconsider (the opposite).

## Divide the question

A motion to separate a main motion and an amendment; if approved, the meeting will vote on the motion and amendment separately.

## E

### **Entertain a question**

The chair asks members for a formal motion on an issue.

### **Executive board**

The local executive, which consists of elected officers.

### **Executive committee**

A committee of the local executive that normally consists of the president, vice-president, recording secretary and secretary-treasurer. A local's by-laws may allow other positions to be part of this committee. The group is also called table officers; they are responsible for functions of the local union when the full executive is not meeting.

### **Expanded negative**

An amendment which, if carried, would produce the same result as a "NO" vote on the main question. Such an amendment is not in order if it contradicts or opposes the main motion.

## F

### **Floor, 'to have the floor'**

A member speaks at a meeting; the chair recognizes a member, which gives them the right to speak.

## G

### **Gavel**

A mallet (wooden hammer) the chair uses during a meeting, to keep order. It symbolizes rules of order and the role of the chair.

## I

### **Item of business**

An agenda item, such as a report, an issue or a motion.

### **Incidental motion**

A motion about another motion that is on the floor.

## L

### **Lay on the table**

A motion to put aside (or table), a main motion until a later, unknown time.

### **Limit or extend debate**

A motion that reduces or increases the number and length of speeches, or the length of debate, on a main motion.

## M

### **Main motion**

The motion that brings an issue to the floor of the meeting.

### **Majority (vote)**

More than half the votes cast.

### **Meeting**

When members gather to discuss issues and make decisions.

### **Member**

A person who belongs to the union.

### **Minutes (of a meeting)**

A written record of what happened at a meeting and what the meeting decided.

### **Motion**

A formal proposal that asks members at a meeting to decide on a certain action; it is also called 'the question'.

### **Move**

How a member launches a motion at a meeting: "I move that..."

### **Mover**

The person who makes a motion.

## N

### **New business**

Agenda items that relate to new issues.

### **Nomination**

During an election, a member suggests someone as a candidate for an office or position.

### **Nominee**

A person nominated for a position during an election.

### **Notice of meeting**

An official, written announcement that provides union members with an agenda for an upcoming meeting.

### **Notice of motion**

An official announcement that describes a major issue the local wants members to debate and discuss at an upcoming meeting.

### **Null and void**

Cancelled or invalid.

## O

### **Objection**

A member formally opposes or challenges an item or procedure at a meeting.

### **Officer**

A union member who is elected to act on behalf of the local or union.

### **On the floor**

The time when a motion is being discussed and debated at a meeting.

### **Order of business**

The items on an agenda.

### **Orders of the Day**

An agenda item that the meeting will deal with at a specific time.

### **Out of order**

A motion, action, request or procedure that does not follow the rules of order.

## P

### **Parliamentarian**

A person who knows parliamentary procedure and provides the chair with advice on the rules.

### **Parliamentary procedure**

A system of rules to conduct effective meetings.

### **Point of information**

A question to the chair for information about the business the meeting is discussing.

### **Point of order**

A formal question to the chair about whether the meeting is following correct procedures.

### **Point or question of personal privilege**

An urgent question that asks the chair for an immediate ruling; often relates to misconduct by another member, illness or a desire to leave the meeting.

### **Point or question of privilege**

An urgent question that asks the chair for an immediate ruling; it relates to the rights of members and how well they can participate, in the meeting; points may include comfort or safety in the room, and ability to hear the proceedings.

### **Postpone to a certain time**

A motion to postpone discussion and voting on a motion until a later date or time.

### **Postpone indefinitely**

A motion that stops discussion on a main motion and avoids a vote.

### **Precedence of motions (order of precedence)**

The ranking of motions from highest to lowest; this determines the order in which the chair must deal with motions.

## **Present**

When a member is physically present at a meeting; a certain number of members must be present to achieve quorum.

### **Preside over**

To chair a meeting.

### **Presiding officer**

The person in charge of the meeting, also called the chair.

### **Previous question, call the question**

A motion to stop debate of the motion on the floor. If the motion passes, the chair calls for an immediate vote on the motion.

### **Put the question**

The chair asks members to vote now on a motion.

## Q

### **Question**

Another term for a motion.

### **Quorum**

The number of members who must be present (in the room) for the meeting to be valid and to proceed.

## R

### **Receive a report**

Hear a report without taking action.

### **Recess**

A short break that does not end the meeting.

### **Recognize a member**

The chair acknowledges a member's right to speak; allows the member to speak.

### **Reconsider (Motion to)**

A motion that, if approved, will allow a meeting to debate and vote again on a motion already decided.

### **Recount**

Count the vote again.

### **Refer to a committee**

A motion that sends a main motion to a smaller group within the local; this group will think about and discuss the motion outside the meeting; the committee may bring the motion to a future meeting so members can debate and vote on it. The referral can be with or without instructions.

### **Report**

A formal communication to a meeting from a committee or officer.

### **Resignation**

A member gives up an office, position or appointment.

### **Resolution**

A formal proposal on an important issue, raised at a convention. A resolution calls for action and states the reasons for the action.

### **Roll call**

At the start of a meeting, announcing the names of officers to determine who is present; this roll call becomes part of the minutes of the meeting.

### **Roll call vote**

A way of voting on a motion; when a member's name is called out, they state their vote, for or against the motion.

### **Rules of order**

Written rules apply to how the local union conducts meetings.

### **Ruling**

A decision made by the chair.

## **S**

### **Second a motion**

A member who did not launch a motion states their support for having the motion considered.

### **Secunder**

The member who seconds a motion.

### **Secret ballot**

A ballot vote where members' votes are kept secret.

### **Show of hands vote**

A way of voting on a motion; members raise their hand to express their choice, for or against, the motion.

### **Speaker**

A member who has the floor; "the chair will first recognize the speaker as having the right to speak at the meeting.

### **Standing committee**

A permanent committee of the local; it holds regular meetings.

### **State the motion**

The chair reads the motion to the meeting before discussion and again before the vote.

### **Subsidiary motions**

Motions that change, postpone or put aside a motion (question) that the meeting is dealing with.

### **Substitute amendment**

A motion that deletes words from a main motion and inserts new words to replace them.

### **Suspend the rules**

A meeting decides by a 2/3 vote to stop the meeting to deal with urgent business.

### **Sustain the decision of the chair**

Members at a meeting decide to support and uphold a chair's ruling after someone challenged it.

## **T**

### **Table**

A shorter way to refer to the motion to "lay on the table".

### **Table officers**

The local executive committee; it normally includes the chairperson, vice-chairperson, secretary-treasurer and assistant secretary.

### **Take from the table**

Take another look at a motion that was laid on the table, or "tabled"; resume debate on such a motion.

**Term of office**

The length of time a member serves in an elected or appointed role.

**Tie vote**

An equal numbers of votes for and against a motion. The motion fails because there is no majority vote.

**Tile the doors**

Closing the doors to prevent anyone from coming in or leaving the room until a vote is complete.

**Two-thirds vote**

At least two-thirds of members present and voting must vote in favour of a motion for it to pass.

**U****Unanimous vote**

All members voted in favour of a motion; there was no opposition.

**Undebatable**

No debate is allowed on certain kinds of motions.

**Unfinished business**

Issues and motions that come from a previous meeting.

**V****Vacancy**

An office or position that is empty (unoccupied).

**Vacate the chair**

When the chair wants to be part of a debate, they will request that another member chair the meeting temporarily; usually the vice-chairperson or secretary-treasurer will take over.

**W****Withdraw a motion**

A member who moved a motion requests that the meeting no longer consider it. Once the chair has stated the motion aloud, only a majority vote can withdraw the motion.

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*Acknowledgement: This glossary is based on a glossary developed by Nancy Sylvester, a writer and trainer on parliamentary procedure.*



## SECTION THIRTEEN

# Connecting With Other Unions

At a provincial level, HEU is building strong ties to the unions we work and bargain with. Unity is essential to building the strength of the labour movement. Listed below are some groups we work with and you where you can find further resources and information:

- B.C. Federation of Labour (BC Fed), [www.bcfed.ca](http://www.bcfed.ca)
- Canadian Labour Congress (CLC), [www.canadianlabour.ca](http://www.canadianlabour.ca)
- Canadian Union of Public Employees BC Division (CUPE BC), [www.cupe.bc.ca](http://www.cupe.bc.ca)
- CUPE National, [www.cupe.ca](http://www.cupe.ca)
- B.C. Government and Service Employees' Union (BCGEU), [www.bcgeu.ca](http://www.bcgeu.ca)
- BC Teachers' Federation (BCTF), [www.bctf.ca](http://www.bctf.ca)
- Health Sciences Association (HSA), [www.hsabc.org](http://www.hsabc.org)
- Local 882 International Union of Operating Engineers (IUOE), [www.iuoe882.ca](http://www.iuoe882.ca)
- Local Labour Councils can be found through the CLC, [www.canadianlabour.ca](http://www.canadianlabour.ca)
- UFCW Local 15, [www.ufcw1518.com](http://www.ufcw1518.com)
- Unite Here Local 40, [www.uniteherelocal40.org](http://www.uniteherelocal40.org)
- United Steelworkers District 3 (USW), [www.usw.ca/districts/3](http://www.usw.ca/districts/3)

As a chairperson, it is important to keep an ongoing open dialogue with all unions and Labour Councils. We count on our collective solidarity and actions as workers to achieve our common goals such as a living wage, increase the minimum wage, advocate for improvements to senior's care, social housing, and other social justice and human rights issues.



## SECTION FOURTEEN

# Annual Labour Events & HEU Days

### January

- Local Elections (until end of April)
- Canadian Labour Congress Winter School
- Black Excellence Day (Jan 15)
- International Holocaust Remembrance Day (Jan 27)
- National Day of Remembrance and Action Against Islamophobia (January 29)

### February

- Black History Month
- Lunar New Year
- CLC Winter School
- Pink Shirt Day (February 22)

### March

- Community Social Services Month
- International Women's Day (March 8)
- International Day for the Elimination of Racial Discrimination (March 21)
- World Water Day (March 22)

## April

- Ramadan (March 22 - April 20, Eid last day, 2023)
- World Health Day (April 7)
- National Medical Laboratory Week (April 9-15, 2023)
- International Day of Pink (April 12)
- Vaisakhi (April 14, 2023)
- International Earth Day (April 22)
- Administrative Professionals' Day (April 26, 2023)
- National Day of Action for LTC (April 27)
- National Day of Mourning (April 28)

## May

- Asian Heritage Month
- May Day – International Workers' Day (May 1)
- National Day of Awareness for the Missing and Murdered Indigenous Women (May 5)
- National Nursing Week (May 8-14, 2023)
- International Day against Homophobia and Transphobia (May 17)

## June

- Pride Events
- Indigenous History Month
- Injured Workers' Day (June 1)
- World Environment Day (June 5)
- Collective Bargaining Rights Day (June 8)
- Philippines Independence Day (June 12)
- Miner's Memorial (June 18)
- National Indigenous Peoples Day (June 21)
- Summer Institute for Union Women (June 25-29)

## July

- Pride Events

## August

- Pride Events
- Emancipation Day (Aug 1)

## September

- Pride Events
- Labour Day (September 4)
- Orange Shirt Day (September 30)
- National Day for Truth and Reconciliation (September 30)

## October

- International Day of Older Persons (October 1)
- Mental Health Week (October 1-7, 2023)
- International Day of the Girl (October 11)
- HEU Day (October 13)
- International Day for the Eradication of Poverty (October 17)
- Health Care Assistant's Day (October 17)
- National Pharmacy Technician Day (October 17, 2023)
- Health Care Assistant Day (October 18)

## November

- Indigenous Veterans Day (November 8)
- Remembrance Day (November 11)
- Diwali (November 12, 2023)
- Transgender Day of Remembrance (November 20)

## December

- World AIDS Day (December 1)
- International Day of Persons with Disabilities (December 3)
- National Day of Remembrance and Action on Violence against Women (December 6)
- Hanukkah (December 7-15, 2023)
- Human Rights Day (December 10)
- International Day to End Violence Against Sex Workers (December 17)
- International Migrant Workers Day (December 18)
- Kwanzaa (December 26 - January 1)

\*Does not include “occupational” days



## SECTION FIFTEEN

# Contact Us

### Provincial Office

5000 North Fraser Way  
Burnaby, B.C. V5J 5M3  
604-438-5000  
1-800-663-5813 (toll-free)  
fax: 604-739-1510





### Okanagan Office

250-1815 Kirschner Road  
Kelowna, B.C. V1Y 4N7  
1-800-219-9699 (toll-free)  
fax: 1-250-765-0181

### Kootenay Office

745 Baker Street  
Nelson, B.C. V1L 4J5  
1-800-437-9877 (toll-free)  
fax: 1-250-352-6999

### Online Platforms

-  [heu.org](http://heu.org)
-  Hospital Employees' Union
-  @HospEmpUnion
-  heu\_in\_bc

### Northern Office

1197 Third Avenue  
Prince George, B.C. V2L 3E4  
1-800-663-6539 (toll-free)  
fax: 1-250-562-3645

### Vancouver Island Office

201-780 Tolmie Avenue  
Victoria, B.C. V8X 3W4  
1-800-742-8001 (toll-free)  
fax: 1-250-480-0544

### Vancouver Island - Comox Office

6-204 North Island Highway  
Courtenay, B.C. V9M 1C7  
1-800-624-9940 (toll-free)  
fax: 1-250-331-0673

### Email

-  [heu@heu.org](mailto:heu@heu.org)









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