2020

A guide to answer questions about your role as Secretary-Treasurer.

Secretary-Treasurer's Manual

Welcome

Congratulations on your election as Secretary-Treasurer for your local! This is an important and rewarding way to serve your union. I've always cherished the years I spent as Secretary-Treasurer for my local and loved playing my part in building our union and making my local strong.

Being Secretary-Treasurer of your local comes with some authority but also a great deal of responsibility. The Secretary-Treasurer plays a critical role in ensuring a local's success by maintaining a high standard of accountability and transparency for all local activities.

The Secretary-Treasurer's Manual will help you understand your role and how to fulfill your responsibilities. It is designed to be a reference tool that you can turn to throughout your time as Secretary-Treasurer. In the pages that follow, you will find answers to questions about your Secretary duties, Treasurer duties, HEU's Policies and Procedures and how they apply to your role and to your local, and where you can find additional resources.

As Secretary-Treasurer, you are entrusted with the care of your local's rebate funds and have the responsibility to make the best decisions in the interest of your local but also in accordance with HEU's Constitution and By-Laws. In addition, there is criteria for the use of local union funds that is approved by the Provincial Executive, outlined in this manual.

The Secretary-Treasurer's Manual is one of many resources that you can turn to for information on the union's processes. Regular Secretary-Treasurer Mailouts from HEU will provide you with important union updates. The HEU website (www.heu.org) is an excellent source for news updates about bargaining, organizing, and union activism. It is also where you can find many of the forms referenced in this manual.

The aim of this manual is to make clear the processes for Secretary-Treasurers to follow for local activities. You can find this manual and all of its relevant forms online at www.heu.org/heu-locals. If you have any suggestions on improvements to this document, or questions about anything in this manual, please contact me at the Financial Secretary's Office at: 604-456-7004.

I hope this resource will help in your success as Secretary-Treasurer!

In Solidarity,

B.L. Valenzuela

Betty Valenzuela
Financial Secretary
Hospital Employees' Union

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TAB ONE

Secretary Duties

DUTIES OF THE SECRETARY-TREASURER

The Constitution and By-Laws of the Hospital Employees' Union states, under ***Article 16, Section C***, the following:

ARTICLE 16

Duties of 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 audited 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 pro tem.

Details of the requirements of the Secretary-Treasurer will be reported in various indexes of the Secretary-Treasurer's Manual.

The Secretary-Treasurer is bound by the oath of office as per ***Article 17, Installation*** of the Constitution and By-Laws:

> *"…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."*

MEETINGS – QUORUM

Each Local shall hold regular monthly meetings. Monthly 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.

On the Local minutes form, the number required for quorum is mandatory. If there is no quorum, members who are in attendance or provide a letter, should still be counted as a meeting attended in that year. This will be counted towards their eligibility to run for office.

As per ***Article 14, Section D*** of the Constitution and By-Laws, the following constitutes a quorum for Local meetings:

Local Membership	Quorum
0-50 members	5 members
51-175 members	7 members
176-300 members	9 members
301-500 members	15 members
501-1000 members	20 members
1001+ members	25 members

*For more details on Quorum, see **Article 14, Section D** of the Constitution and By-Laws.*

MEETINGS – MINUTES

The Secretary-Treasurer has a lot of responsibilities. This includes, but is not limited to, taking the minutes of all meetings, creating the draft agendas for meetings, putting up meeting notices, and submitting minutes and other documents to the Provincial and Regional Offices.

The order in which a meeting is conducted is outlined in the Constitution as per ***Article 1, Order of Business***. Items may be deleted if not required, moved, or added as necessary simply by making a motion to amend the agenda.

Article 16, Section C of the Constitution and By-Laws states:

> *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.*

Copies of these membership meeting minutes, bearing the signatures of both the Secretary-Treasurer and the Chairperson of the Local, must be forwarded to the Provincial Office by emailing localdocuments@heu.org.

When the minutes are being taken, it is not necessary for the Secretary-Treasurer to record the name of the mover of the motion or the name of the seconder.

Local minutes should not be posted on the Union Board or forwarded on Employers' email server.

Download this form online: heu.org/heu-locals

LOCAL MINUTES TEMPLATE - PDF

Local: _____

Date of meeting: _____

Number of members present: _____

Quorum required: _____

Names of guests present: _____

1. CALL TO ORDER

_____

2. ROLL CALL OF OFFICERS AND REGRETS

Chairperson _____

Vice-Chairperson _____

Secretary-Treasurer (or Secretary) _____

Assistant Secretary (or Treasurer) _____

Senior Trustee _____

Senior Trustee-Elect _____

Trustee _____

Conductor _____

Warden _____

Other/Additional _____

3. EQUITY STATEMENT

Read ☐

4. INITIATION OF MEMBERS – Enter names of new members.

_____

SAMPLE FORM

LOCAL MINUTES TEMPLATE - PDF

5. READING OF MINUTES

Errors or Omissions: Yes ☐ No ☐

6. CORRESPONDENCE – Indicate communications, if filed, or to be discussed or move to appropriate Order of Business.

7. TREASURER'S REPORT (Revenues and Expenses) – After each report, indicate motion to receive and attach if written.

8. TRUSTEES REPORT – After each report, indicate motion to receive and attach if written.

9. REPORT OF DELEGATES AND COMMITTEES – After each report, indicate motion to receive and attached if written.

10. UNFINISHED BUSINESS – Indicate motion after each item.

11. ELECTIONS AND INSTALLATION OF OFFICERS – Indicate position, those nominated, and person elected.

SAMPLE FORM

Download this form online: heu.org/heu-locals

LOCAL MINUTES TEMPLATE - PDF

_____

_____

_____

12. NEW BUSINESS

_____

_____

_____

13. GOOD AND WELFARE

_____

_____

14. QUESTION PERIOD

_____

_____

_____

15. ADJOURNMENT

_____

SAMPLE FORM

Date minutes adopted: _____

Chairperson's Name: _____

Signature: _____

Secretary-Treasurer's or Secretary's Name: _____

Signature: _____

Note: Local Minutes should not be signed by the Chairperson or Secretary-Treasurer until the minutes have been adopted at the next general meeting. A copy of the Local Minutes should be retained by the Local and a copy mailed to Provincial Office or emailed to: localdocuments@heu.org

MAINTENANCE OF LOCAL UNION RECORDS AND ASSETS

The Secretary-Treasurers will have many types of records they must maintain. The question is what records can be discarded or must be kept by the Local.

The following is a guideline for disposal.

Membership Cards, Death Benefit Cards – Change of Membership Data

Due to Privacy of Information laws, please return all Membership and Death Benefit cards to the Provincial Office. Do not leave any cards, regardless of age, at your site.

Account Book/Ledger

The Local should **always** retain the account book or ledger within their possession, as it indicates the activity of the Local as well as being an original record.

Minutes

Minutes of the Executive, special and general meetings should **always**, **always** be kept, **and be scanned** to the Provincial Office to localdocuments@heu.org.

By-Laws

By-Laws passed at Local membership meetings must be scanned to the Provincial Office to localdocuments@heu.org.

Action Agenda

The action agenda should be kept for the current year, plus an additional year. If your local does not have space, the Local may decide to keep just the current year of action agendas.

Bank Statements

The original bank statements must be kept for a minimum of seven (7) years.

LOCAL ASSETS

As per ***Article 14, Section G***, Locals are required to return all funds and assets to the Financial Secretary upon disbandment:

> *"Where an HEU Local disbands, all funds and assets will be returned to the Financial Secretary of the Union."*

MISAPPROPRIATION OF FUNDS AND ACCOUNT RECORDS

As per ***Article 7, Section F***, the Financial Secretary shall investigate whenever it is reported that monies or property of the Union have been misappropriated and may take whatever action is necessary to recover such monies or property.

Any Local, which is having difficulty with its accounting records, may, upon written request to the Financial Secretary, submit its records for review and recommendations.

There have been a number of concerns raised by different Locals regarding discrepancies in Local funds.

In accordance with proper accounting methods, **there should never be signed blank cheques at your Local.**

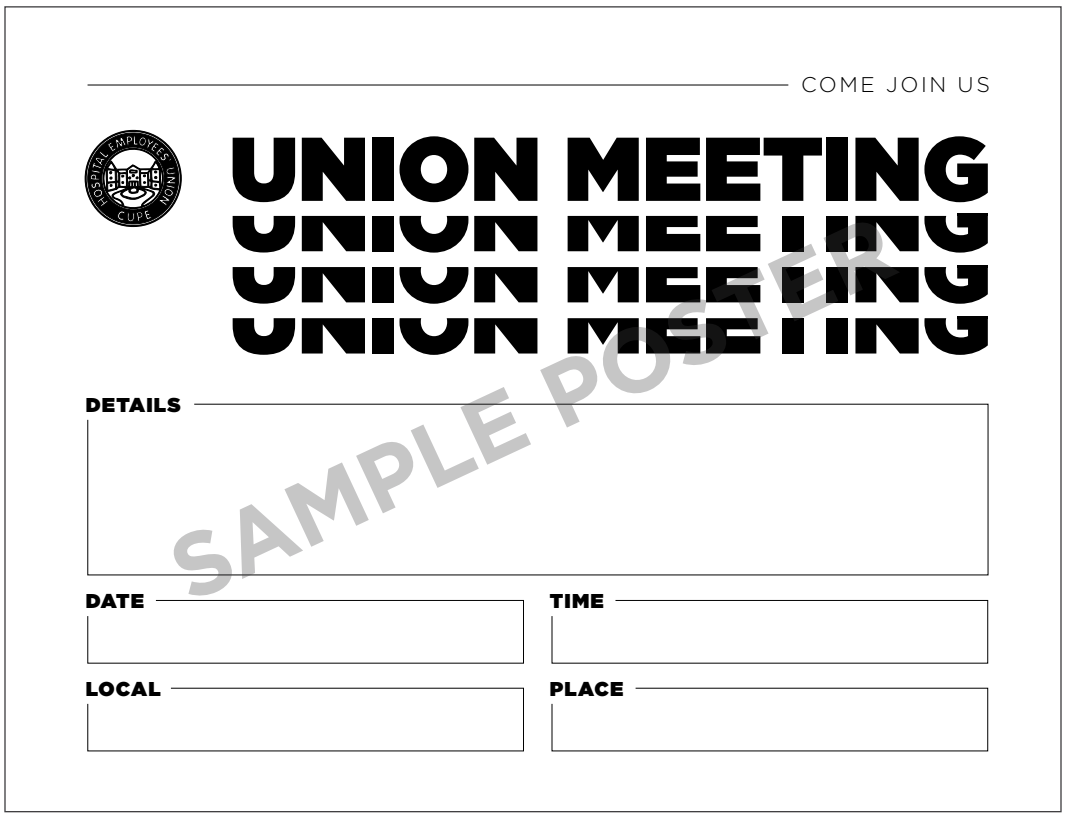
There must be a minimum of three signing authorities at any one time authorized to sign cheques. All cheques must have two signatures. Trustees cannot be a signing authority at the Local level as they review all financial transactions.

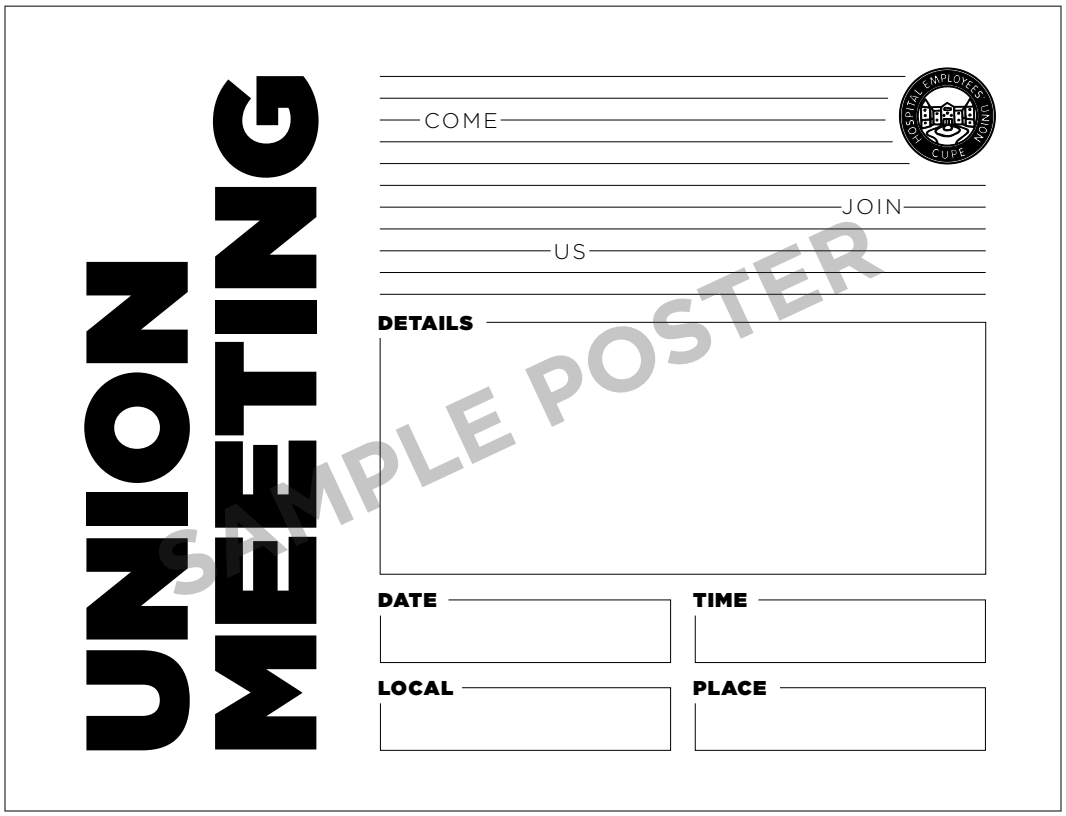
MISCELLANEOUS

The following items are available at no cost to the Local from the Provincial Office upon request from the mailroom:

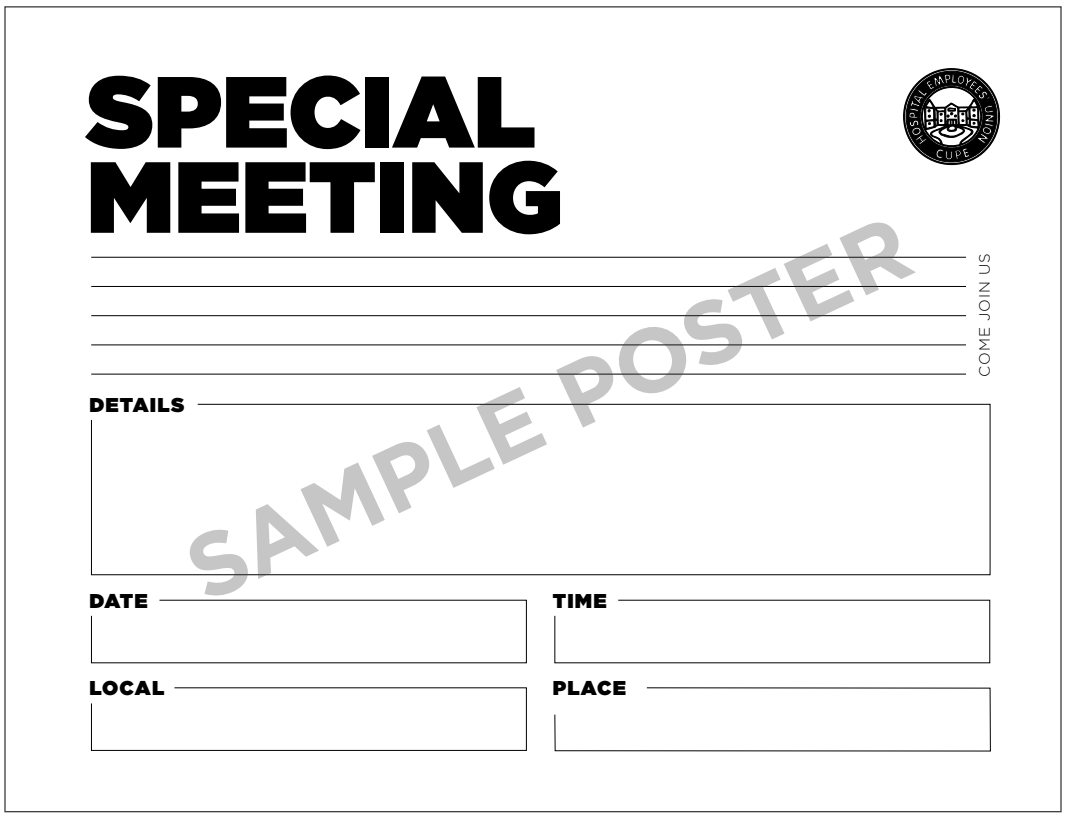
- Regular Monthly Meeting Notices
- Special Meeting Notices
- HEU Local Executive Form 2020
- Retirement Report for retiring members of your Local, which is to be submitted to the Guardian Committee of the Hospital Employees' Union, by emailing members@heu.org and include "Retirement Report" in the subject line.

Download these posters online: heu.org/heu-locals





Download this poster online: heu.org/heu-locals



Download this form online: heu.org/heu-locals

Member ID Number: _____
Provincial/Regional Office Staff Use Only

HEU LOCAL OFFICER FORM 2020

PLEASE PRINT CLEARLY

Please fill out a separate form for **EACH** member who holds an elected or appointed position in your local (this includes all new and returning executives and stewards).

Please make sure to tick all applicable boxes for members who hold multiple positions.

☐ Chairperson ☐ Senior Trustee ☐ Senior Trustee-Elect (2 year) ☐ Trustee

☐ Secretary-Treasurer – *or if the position has been split in two:* ☐ Secretary ☐ Treasurer

☐ Vice Chairperson ☐ Assistant Secretary-Treasurer ☐ Conductor ☐ Warden

☐ Chief Shop Steward ☐ Shop Steward ☐ OH&S steward/committee

☐ ***Site Rep** _____ (site name) ☐ Labour Council Delegate

LOCAL NAME: _____

First Name: _____ Last Name: _____

Personal Email: _____

Home Phone: _____ Cellular Phone: _____

Mailing Address: _____

Job Title: _____

Employer & Work Site (example: Sodexo at Surrey Memorial Hospital): _____

_____

*** Servicing Reps are for merged locals or locals with more than one location where additional copies of the mailings are required.**

Forward all information to HEU Provincial Office at 5000 North Fraser Way, Burnaby, B.C. V5J 5M3 or scan and email to **localdocuments@heu.org**

Date elected and/or appointed: _____
(mm/dd/yyyy)

Submitted by (Chairperson or Secretary-Treasurer): _____
(please print)

Contact information will be shared with Union staff and Provincial Executive members as required to facilitate official union business.

SAMPLE FORM

Download this form online: heu.org/heu-locals

Would you like to be included in the retirement section of the HEU Guardian? If so, please fill out the form below:

RETIREMENT REPORT

NAME of retiree: _____

ADDRESS: _____

HOME PHONE: _____ WORK PHONE: _____

HOSPITAL: _____ POSITION: _____

DEPARTMENT: _____ START DATE: _____

DATE JOINED HEU: _____ DATE RETIRED: _____

LOCAL offices held: _____

_____

_____

PROVINCIAL offices held: _____

_____

_____

COMMUNITY activities: _____

_____

_____

REMARKS: _____

_____

_____

RETIREMENT PLANS: _____

_____

_____

PLEASE SEND TO: **The Guardian c/o HEU Provincial Office**
5000 North Fraser Way, Burnaby, B.C. V5J 5M3
or email ***members@heu.org***

SAMPLE FORM

SUPPLIES – ORDERING

Local supplies can be ordered from the Provincial Office at no charge to the Local.

Included in this section is a sample copy of an ***Order Form***, which is a two-part form. The top sheet covers all non-cost items to the Local; the second sheet covers billable supplies or Boutique items such as: jackets, sweaters, hats and Union pins. These items are sold at cost to the Locals.

For the most up-to-date Order Form, please visit: heu.org/heu-boutique

The process for placing an order is as follows:

1. To confirm stock availability, please email your order to boutique@heu.org or call the Provincial Office mailroom at 604-438-5000. **Note:** not all "out of stock" items on the sample form might still be unavailable, so please do check.
2. Upon receiving a reply email confirmation from the HEU, a Local cheque (payable to HEU) must be received along with an original signed order form within seven days before the goods will be shipped. Please mail to:

   Hospital Employees' Union
   Attn: Mailroom
   5000 North Fraser Way
   Burnaby, BC
   V5J 5M3

Download this form online:
heu.org/sites/default/files/imce-uploads/BoutiqueOrderForm2020Jul21.pdf

2020 BOUTIQUE ORDER FORM

clothing & branded items

DESCRIPTION	CODE	SIZE *								PRICE	TOTAL
~ OUTERWEAR:		XS 1	S 2	M 3	L 4	XL 5	2XL 6	3XL 7	4XL 8		
Jacket Men's (blue)	1072									$75.00	
Jacket Women's (blue)	1082									$75.00	
Rain Poncho	50320	*one size only*								$2.00	
~ SHIRTS: Men's/Unisex/Youth		XS 1	S 2	M 3	L 4	XL 5	2XL 6	3XL 7	4XL 8		
Baseball shirt: men's long sleeve (grey/charcoal)	5104									$24.00	
Golf shirt men's (navy blue)	5022									~~$25.00~~ $10.00	
Athletic men's shirt: long sleeve (navy blue)	5052									~~$22.50~~ $10.00	
HEU logo on back: men's long sleeve (navy blue)	3032									~~$14.00~~ $10.00	
Sweatshirt unisex: crew neck (grey) - logo	5004									$32.00	
Sweatshirt unisex: hooded, zip (grey) - logo	5014									~~$32.00~~ $20.00	
Sweatshirt unisex: hooded, zip (black) - "HEU" letters	5041									$55.00	
Sweatshirt unisex: hooded, zip (grey) - "HEU" letters	5044									$55.00	
t-shirt unisex: 75TH Anniversary (black)	3201									$10.00	
t-shirt unisex: 75TH Anniversary (white)	3209									$10.00	
t-shirt unisex: Anti-bullying	3126									$12.00	
t-shirt unisex: "Care Can't Wait"	3151									$10.00	
t-shirt unisex: HEU logo (blue)	3192									$14.00	
t-shirt unisex: Living Wage Campaign - Adult	3103									$13.00	
t-shirt unisex: Living Wage Campaign - Youth	3113									$13.00	
t-shirt unisex: Orange Shirt Day - Adult	3165									$12.00	
t-shirt unisex: Orange Shirt Day - Youth	3175									$11.00	
t-shirt unisex: "Powered by Solidarity	3181									$14.00	
t-shirt unisex: Pride "HEU"	3141									$16.00	
~ SHIRTS: Women's		XS 1	S 2	M 3	L 4	XL 5	2XL 6	3XL 7	4XL 8		
Baseball shirt: long sleeve (white/grey)	5119									$24.00	
t-shirt: Rosie the Riveter - modern (navy)	3092									$22.00	
t-shirt: Rosie the Riveter - traditional (black)	3091									$22.00	
V-Neck t-shirt: HEU logo (grey)	3134									$17.00	
										SUBTOTAL (A)	

SAMPLE FORM

*Greyed out sizes are currently out of stock.

PLEASE FILL OUT 'TOTAL' AND 'CONTACT' INFORMATION ON REVERSE

HOSPITAL EMPLOYEES' UNION • 5000 North Fraser Way, Burnaby, BC V5J 5M3 • TEL: 604-438-5000 • FAX: 604-739-1510 • WEB: www.heu.org

Prices subject to change without notice.

Revised July 24, 2020

Download this form online:
heu.org/sites/default/files/imce-uploads/BoutiqueOrderForm2020Jul21.pdf

2020 BOUTIQUE ORDER FORM

clothing & branded items

ITEM	CODE	QTY	PRICE	TOTAL
~ BAGS:				
Backpack: HEU logo	72510		~~$30.00~~ $20.00	
Lunch bag: Powered by Solidarity	72611		~~$30.00~~ $20.00	
Messenger bag: Powered by Sol.	72311		~~$70.00~~ $40.00	
Tote bag: HEU logo	72190		~~$13.45~~ $10.00	
~ HATS:				
Baseball Cap: dark grey w/"HEU"	80540		$15.00	
Baseball Cap: light grey w/logo	80500		$15.00	
Women's camp cap: black w/"HEU"	80410		$15.00	
Women's camp cap: blue w/logo	80420		$15.00	
~ MISC:				
First Aid Kit	70590		$3.00	
Frisbee	70720		$2.00	
Mittens (grey bamboo fleece) L/XL	50845		~~$18.50~~ $10.00	
Pen: HEU logo	71320		75¢	
Pen: Powered by Solidarity	71321		75¢	
Scarf	50940		~~$16.25~~ $10.00	
Water Bottle: HEU	71820		~~$17.00~~ $10.00	
SUBTOTAL (B)				

ITEM	CODE	QTY	PRICE	TOTAL
~ PINS:				
Red Dress pin	91280		$2.00	
AIDS Ribbon pin	91480		$3.00	
Committee	90120		$3.00	
Fighting Proud	90320		$3.00	
First Nations	90480		$3.00	
Pink Triangle	90560		$3.00	
OH&S	90720		$3.00	
People with disAbilities	90890		$3.00	
Shop Steward (blue)	90920		$3.00	
Shop Steward (white)	90990		$3.00	
Solidarity	91020		$3.00	
Trades & Maintenance	91520		$3.00	
Women's Committee	91160		$3.00	
SUBTOTAL (C)				

TOTAL (sum of subtotals A, B & C) _____

SAMPLE FORM

*Greyed out items are currently out of stock.

ORDER PROCESS

1) To confirm stock availability please email your order to boutique@heu.org
2) Upon receiving an HEU reply email confirmation, a cheque (payable to HEU) must be received along with an original signed order form within seven days to: HEU, Attn: Finance - 5000 North Fraser Way, Burnaby, B.C. V5J 5M3, before goods will be shipped.

CONTACT INFORMATION: please print CLEARLY.

FACILITY NAME _____ DATE _____

SHIPPING ADDRESS _____ EMAIL: _____

PLEASE COMPLETE **(ONE ONLY)** ***LOCAL*** OR ***INDIVIDUAL:***

LOCAL PURCHASES *– REQUIRE THE SIGNATURE OF TWO (2) SIGNING OFFICERS:*

PRINT NAME OF SECRETARY-TREASURER: _____ SIGNATURE: _____

PRINT NAME OF CHAIRPERSON: _____ SIGNATURE: _____

INDIVIDUAL PURCHASES:

PRINT NAME: _____ SIGNATURE: _____

RETURN POLICY: RETURN/EXCHANGE WITHIN 30 DAYS OF PURCHASE IN ORIGINAL CONDITION

HOSPITAL EMPLOYEES' UNION • 5000 North Fraser Way, Burnaby, BC V5J 5M3 • TEL: 604-438-5000 • FAX: 604-739-1510 • WEB: www.heu.org

Prices subject to change without notice.

Revised July 24, 2020

Download this form online:
heu.org/sites/default/files/imce-uploads/BoutiqueOrderForm2020Jul21.pdf

2020 BOUTIQUE ORDER FORM

supplies and materials

QTY	ITEM (note: no charge for these items)
	Accounting Ledger
	Attendance book
	Ballots – 50/pad
	Change in Membership Data Forms
	Constitution & Bylaws – Booklets, Bound & Stapled (3.5" x 5.5")
	Contracts – ☐ Facility ☐ Community Subsector ☐ Community Social Services (booklets, bound/stapled (3.5"x 5.5")
	Contracts – *For "Independent" and "Other" please contact your Regional Union Representative*
	Death Benefit Fund Card
	Grievance Pads – 10/pad (Grievance Log included)
	Independent Professional Responsibility Form
	Job Review Booklets – Facilities (includes Classification Review Form)
	Legal Advice Notices
	Local Activities Report Form
	Local Executive Form (Political Action Comm., Labour Council Delegate, OH&S Stewards Comm., Griev/Shop Steward Comm.)
	Local Letterhead
	Local Officers Guide to Resolving Conflict and Code of Ethics
	Local Supply Order Form
	'Look who's dropping in' Form
	LPN Professional Responsibility Form
	Membership Meeting Notices – Regular Meeting
	Membership Meeting Notices – Special Meeting
	Minute Record Form
	New Member Kit
	Placards - Blank – 14" x 22"
	Placards – 'HEU Supports' – 14" x 22"
	Quarterly Report Booklets - 12/pad
	Retirement Form
	Retirement Pins – Name of Member:
	Supervisor's Handbook
	Union Fact Sheet: ☐ Facility ☐ Community Subsector ☐ Community Social Services
	Union Meeting Fluorescent Stickers – 24/sheet
	Union Membership Pins
	Workload Journal
	Workload Incident Report Form

SAMPLE FORM

CONTACT INFORMATION: please print CLEARLY.

FACILITY NAME _____ DATE _____

ADDRESS _____

SIGNATURE OF SECRETARY-TREASURER _____

SIGNATURE OF SITE REPRESENTATIVE _____

HOSPITAL EMPLOYEES' UNION • 5000 North Fraser Way, Burnaby, BC V5J 5M3 • TEL: 604-438-5000 • FAX: 604-739-1510 • WEB: www.heu.org

Prices subject to change without notice.

Revised July 24, 2020

CHANGE OF MEMBERSHIP DATA

Enclosed in the manual is a ***Change of Membership Data Form***, which is to be used when changes are made to members' names, addresses, or telephone numbers. This form can be faxed into the HEU Provincial Office at 604-739-1510 or mailed directly to: 5000 North Fraser Way, Burnaby, BC, V5J 5M3

Members may also submit a change in their membership data electronically by going to our HEU website at heu.org/change-contact-information.

This change form and website link have been implemented in order for the Provincial Office to update our membership records on a regular basis.

It would be advisable if these forms were made known and accessible to the membership at every union meeting, orientation, etc.

Download this form online: heu.org/heu-locals

CHANGE OF MEMBERSHIP DATA

(To be retained by provincial financial secretary)

You can update your information online:
heu.org/change-contact-information

Or mail your completed form to:
Hospital Employees' Union
5000 North Fraser Way
Burnaby, BC V5JJ 5M3

Change of:

○ Name ○ Address ○ Telephone ○ Email

Please print all information in full

Present Name _____

Former Name _____

Current Address _____

Former Address _____

Home Phone _____

Cell Phone _____

Personal E-mail _____

Work E-mail _____

Facility Name _____

Job Title _____

Signature _____

Date _____

SAMPLE FORM

DEATH BENEFIT CARDS

All members of the Hospital Employees' Union shall be entitled to all benefits stipulated under the Death Benefit Fund up to the financial limit as set out in the Constitution and By-Laws.

Article 23, Section D, states:

> *"The Benefit for members will be equal to the maximum Canada Pension Plan (CPP) Death Benefit or $2,500.00, whichever is greater".*

When a member ceases to be a member of the Hospital Employees' Union, the member is no longer entitled to benefits. Notwithstanding the foregoing, any member who, because of terminal illness is obligated to relinquish their employment shall be eligible for death benefits. Therefore, if a member is forced to resign their position due to the terminal illness and is no longer retained on the payroll records of the facility, they are still entitled to death benefits under the Constitution and By-Laws. If a member is being forced to resign their position, they should consult their Staff Representative at HEU.

Terminally ill members will be able to have death benefit monies paid to them, prior to death, providing proof of illness has been submitted to the Financial Secretary. When someone is terminally ill, they are eligible for the payment equal to the maximum CPP death benefit or $2,500, whichever is greater. However, a report from the physician is required indicating the member is terminally ill before the claim can be processed.

The death benefit card itself has been amended to incorporate the "age required if beneficiary is a minor". This has been added to the death benefit card as a result of legal challenges from dependants who might have been minors at the time of the claim.

When a Union member transfers their service from one facility to another, and this transfer of service takes place within ninety (90) days, they shall be considered eligible for benefits. The Constitution and By-Laws of the Hospital Employees' Union states that no Local shall advance or loan monies against any claim being submitted by a beneficiary of a member. It is important to note that notice must be received by the Financial Secretary within one (1) year after the date of death. Claims received after such date will not be considered, unless a satisfactory reason for the delay is provided to the Trustees.

When a member dies without naming a beneficiary, payment of any benefits accruing from their death shall be made payable to their estate.

In case a deceased member's beneficiary is a minor, and the deceased was a member, the Financial Secretary may act as a guardian, curator or trustee of the deceased member's minor beneficiary, in case such minor has no regular appointed guardian, for the purpose of receiving on behalf of such minor, any benefits due. Otherwise, the cheque shall be made payable to "In Trust for...".

A copy of the Death Benefit card is attached for your reference. Please note this is a **2-part card**; once you have witnessed the member's signature, one card should be given to them for safe-keeping and the other must be mailed to the Provincial Office.

Article 23, Section F reads:

> "***Proving of a Claim:*** When any death occurs, the person applying for benefit shall furnish the Financial Secretary of the Union with a certified copy of the official death certificate, together with all papers required. ***A Member is only entitled to one (1) death benefit.***

An application on behalf of a Member with terminal illness will require a physician's note that shall be forwarded to the Financial Secretary.

Due to privacy laws, please do not keep any Death Benefit cards at your site and ensure you are using the 2-part card for all new hires and beneficiary changes.

These cards should be available to the membership at all union meetings, orientations, etc.

DEATH BENEFIT PROCEDURES

Death Benefit

Under the Constitution and By-Laws of the Hospital Employees' Union, when there is a death of a member in your Local, the family will notify the Finance Department in the Provincial Office of this death, providing the name and date of the death. The Finance Department will initiate the paperwork to have this claim activated and complete the process.

A listing of all death benefits paid out in a fiscal year is reported at Convention in the Financial Secretary's Report.

Terminal Illness

Under the Constitution and By-Laws of the Hospital Employees' Union, when there is a terminally ill member in your Local, a member will notify the Finance Department in the Provincial Office. The Finance Department will initiate the paperwork to have this claim activated.

Please note: A new death benefit card assigning the member as the beneficiary of the funds, must be signed and witnessed by one of the Table Officers. It must be submitted to Provincial Office as soon as possible.

*TO BE RETAINED BY **MEMBER***

DEATH BENEFIT FUND

PLEASE PRINT CLEARLY. ALL INFORMATION IS MANDATORY

Local _____ Date _____ 20_____

Name _____
Last First Middle

Address _____
Apartment / Street City Province Postal Code

DATE OF BIRTH _____ Date of Joining Union _____

Beneficiary Name _____ Contact Number _____

Relationship to Member _____ Age _____
If a minor

Address _____
Apartment / Street City Province Postal Code

_____ _____
Signature of Member Signature of Chair or Secretary-Treasurer

9/2017

FOR CHANGE OF BENEFICIARY, A NEW CARD MUST BE SUBMITTED

PEA HESU

*TO BE RETAINED BY **FINANCIAL SECRETARY***

DEATH BENEFIT FUND

PLEASE PRINT CLEARLY. ALL INFORMATION IS MANDATORY

Local _____ Date _____ 20_____

Name _____
Last First Middle

Address _____
Apartment / Street City Province Postal Code

DATE OF BIRTH _____ Date of Joining Union _____

Beneficiary Name _____ Contact Number _____

Relationship to Member _____ Age _____
If a minor

Address _____
Apartment / Street City Province Postal Code

_____
Signature of Member Signature of Chair or Secretary-Treasurer

FOR CHANGE OF BENEFICIARY, A NEW CARD MUST BE SUBMITTED

9/2017

PEA HESU

SAMPLE CARD

MEMBERSHIP APPLICATION

A copy of the ***Application for Membership Card*** is attached for your reference. It is the responsibility of the Employer, under the Collective Agreement, to ensure all members of the Hospital Employees' Union are signed up with the Union, no later than the beginning of the third bi-weekly pay period.

The Employer must ensure the Application for Membership Card is provided to every new employee hired at a facility and once completed, will submit the card and deduct the $5.00 initiation fee. The initiation fee must be remitted to the Provincial Office and clearly identified on the dues check-off listing they provide with the payment.

The second section of the card is retained by the Employer and is the assignment of fees and dues. This section of the card gives the Employer authority to deduct union dues from the members, in accordance with the Constitution and By-Laws, with the initiation fee being five dollars ($5.00) and the dues per month being 2.1% of gross salary, as shown in the wage schedules.

SUBMIT TO PROVINCIAL OFFICE UPON COMPLETION

APPLICATION FOR MEMBERSHIP

PLEASE PRINT CLEARLY

I, (PRINT NAME IN FULL) _____
FIRST LAST

a. do hereby apply for membership in the Hospital Employees'Union;
b. understand, if admitted, I shall be bound by the Constitution and By-Laws of the Hospital Employees' Union;
c. in applying for a membership, I understand that the union intends to apply to be certified as my exclusive bargaining agent and to represent me in collective bargaining.

Signature _____ Date ____ / ____ 20 ____
Day Month Year

Address _____
Apartment # Street P.O.Box

_____ Home phone _____
City Province Postal Code

Employer _____ Work Phone _____

Work Site Name _____ Cell Phone _____

May2018

Personal Email _____

TO BE RETAINED BY THE EMPLOYER

ASSIGNMENT FOR FEES AND DUES

PLEASE PRINT CLEARLY

To: (PRINT NAME OF EMPLOYER) _____

Effective immediately and until this authority is revoked by me in writing, I hereby authorize you to deduct from my wages and pay to the HOSPITAL EMPLOYEES'UNION, fee and dues in the amounts following:

- Initiation Fee: Five dollars ($5.00)
- Dues Per Month: 2.1% of gross salary

I further authorize you to deduct from my wages and pay to the said union such further increased fees and dues or levies in accordance with the Constitution and By-Laws of the said union and notified to you in writing by the Provincial Financial Secretary.

Print name in full _____

Signature _____

May2018

Personal Email _____ Date ____ / ____ 20 ____
Day Month Year

SAMPLE CARD

MEMBERSHIP CARDS

In 2015 HEU changed our HEU Membership Cards and the way in which membership cards are distributed. The new HEU Membership Card and cover letter is attached for your reference.

In the past, HEU Membership Cards were distributed to new members by the Local Secretary Treasurer. With the implementation of our new membership data system, Unionware, the Provincial Office will be able to mail the Membership Cards directly to HEU members upon receipt of the initiation fee and application for membership.

There was an initial mailing of new HEU Membership Cards to all current HEU members. Since then, an HEU Membership Card will be mailed directly to new members once they are entered into our data system.

A "Welcome to Your Union" letter with information about the Union will be included with the Membership Card.

The new Membership Cards will no longer record the member's department as it is no longer required for distribution.

Jane Elizabeth Smith
1234 Somewhere Road
Cityville, BC, Canada
V3H 5G7

WELCOME to your union

AS A NEW MEMBER, you can take pride in being part of B.C.'s largest and most successful health care union.

For over 75 years, health care workers like you have turned to HEU for representation in the workplace.

Together, we have negotiated solid collective agreements that have improved working and caring conditions that benefit not only workers – but the patients, residents and clients we look after.

And every single day, shop stewards, local union executives and union staff are working hard to enforce these collective agreements and ensure that HEU members are treated with fairness and respect.

We advocate for safer workplaces, improved access to education and training, and stronger job security.

HEU's 50,000 members are backed by the resources of a modern, professional union, but we have never strayed from our democratic traditions. We are member-driven and member-focused.

Your union is a strong advocate for quality and accessible public health care going back

over

MEMBER IN GOOD STANDING

Jane Elizabeth Smith

ISSUED: 2015

ID NUMBER: 110054

Punch out carefully along perforation. Do not peel!

to the founding of medicare. We speak out for the protection of human rights and the environment, and we stand in solidarity with those in our communities who are fighting for economic and social justice.

As an HEU member, you can attend union meetings with voice and vote. Ask around your workplace or check the union board to see when your HEU Local meetings take place.

Stay informed about the activities of your union. Sign up for email news at www.heu.org – and don't forget to join the conversation on HEU's Facebook page (www.facebook.com/hospitalemployeesunion).

And if you want to learn a little bit more about how your union works, check out our fun (and short) video at www.heu.org/structure (or go to YouTube and search "How our union works!").

In Solidarity,

Betty L. Valenzuela

Betty Valenzuela
HEU Financial Secretary

Please find attached your new HEU membership card. Carry it with pride. After all, we built this union together.

www.heu.org

Locations:

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

Vancouver Island
VICTORIA SITE
201-780 Tolmie Avenue
Victoria, B.C. V8X 3W4
Phone: 250-480-0533
1-800-742-8001 (toll-free)
Fax: 250-480-0544

Vancouver Island:
COMOX SITE
6-204 North Island Highway
Courtenay, B.C. V9N 3P1
Phone: 250-331-0368
1-800-624-9940 (toll-free)
Fax: 250-331-0673

OKANAGAN
100-160 Dougall Road South
Kelowna, B.C. V1X 3J4
Phone: 250-765-8838
1-800-219-9699 (toll-free)
Fax: 250-765-0181

KOOTENAY
745 Baker Street
Nelson, B.C. V1L 4J5
Phone: 250-354-4466
1-800-437-9877 (toll-free)
Fax: 250-352-6999

NORTHERN
1197 Third Avenue
Prince George, B.C. V2L 3E4
Phone: 250-564-2102
1-800-663-6539 (toll-free)
Fax: 250-562-3645

www.heu.org

Barb Nederpel, President

Jennifer Whiteside, Secretary-Business Manager

Betty Valenzuela, Financial Secretary

This card is null and void when employment is terminated or when status as a member is lost.

TAB TWO

Treasurer Duties

DUTIES OF THE SECRETARY-TREASURER

The Constitution and By-Laws of the Hospital Employees' Union states, under ***Article 16, Section C***, the following:

ARTICLE 16

Duties of 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 audited 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 pro tem.

Details of the requirements of the Secretary-Treasurer will be reported in various indexes of the Secretary-Treasurer's Manual.

The Secretary-Treasurer is bound by the oath of office as per ***Article 17, Installation*** of the Constitution and By-Laws:

> *"…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."*

SIGNING OFFICERS

The Signing Officers for the Union, provincially, consist of the following:

President
Financial Secretary
1st Vice-President
Senior Trustee

Following this principle, it is suggested Locals maintain the same status and have their Signing Officers of their Local as follows:

Chairperson	**or**	**Chairperson**
Vice Chairperson	**or**	**Vice Chairperson**
Secretary	**or**	**Secretary-Treasurer**
Treasurer	**or**	**Assistant Secretary-Treasurer**

A Local must have at least three (3) Signing Officers and three (3) Trustees. As there must be a distinct separation of duties at the Local level, a Trustee cannot be a Signing Officer.

For larger Locals or for Locals with multiple sites, it would be recommended to have at least 4 Signing Officers.

Also, it is advisable to wait until **after** the election of the Local Officers to inform the bank of any changes in the names of the Signing Officers.

PAYMENT OF BILLS

The Constitution and By-Laws of the Hospital Employees' Union requires the Secretary-Treasurer pay all bills sanctioned by the Local, by cheque. Every payment made by the Local **must** have supporting documentation/receipts which explain why the money was spent. (Please see Local Cheque Requisition form on page 28). **Funds should never be advanced to members.**

All payments should be reported and approved by your Local membership. If an invoice is required for payment, and for one reason or another there is no Local meeting, it must be brought forward at the next regular meeting for endorsement by the membership. Most Locals have By-Laws to ensure regular Local expenditures are authorized for payment, in case they do not meet quorum.

It is very important that there are no pre-signed blank cheques. If it is required to have additional signing officers, a motion should be put forward at a Local meeting to have this change implemented.

It is highly recommended that Locals pass a By-Law to adopt an annual budget detailing how rebates and any other income will be spent for meetings, travel, honorariums, education, donations and other costs. Any expenses outside of the approved budget must be referred back to the membership for approval.

LOCAL ANNUAL BUDGET & QUARTERLY TRACKING TEMPLATE

It is strongly recommended Locals prepare an annual budget for approval by the membership at a meeting with quorum.

Local Name: _____ Date: _____

	CURRENT YEAR BUDGET	Q1 ACTUAL	Q2 ACTUAL	Q3 ACTUAL	Q4 ACTUAL	Total
REVENUE - REBATES	$	$	$	$	$	$
LESS: EXPENSES						
Room Rental						
Honorariums						
Cell Phone/Internet						
Office Supplies/Postage						
Retirement Gifts						
Member Education						
Per Capita Expense						
Local Events						
Convention Registration						
Bank Service Charges						
Donations						
Local Bursaries						
Other Expenses:						
TOTAL EXPENSES	$	$	$	$	$	$

** Expenses MUST match that of the Quarterly Report.*

NET BALANCE	$	$	$	$	$	$

SAMPLE FORM

Download this form online: heu.org/heu-locals

Download this form online: heu.org/heu-locals

LOCAL CHEQUE REQUISITION

LOCAL NAME: _____

CHEQUE REQUISITION

CHEQUE TO: _____ DATE: _____

ADDRESS: _____ AMOUNT: $ _____

_____

_____

PURPOSE:

_____

_____

_____

_____

_____

(PLEASE ATTACH ALL RECEIPTS)

REQUESTED BY: _____

APPROVED BY: _____

(i.e.: EXECUTIVE OR MEMBERSHIP MEETING)

DATE: _____

SAMPLE FORM

QUARTERLY REPORTS

Every three months, the Secretary-Treasurer shall prepare a Quarterly Report. Quarterly Reports reflect the rebates and the expenses of the Local and ensure that the Local is transparent and accountable for the money and assets entrusted to them. The Trustees will go over the finances of the Local and compare them to the motions and By-Laws that support the expenditure. These are entered into the Quarterly Reports which are submitted to the Provincial Office for review. This process is governed by the Constitution:

Article 16, Section C: *The Secretary-Treasurer shall keep an accurate account, and forward a quarterly financial statement, which has been audited by the Local Trustees, to the Financial Secretary.*

Article 7, Section G: *Trustees shall review and monitor all Local quarterly reports and report inconsistencies or concerns to the Financial Secretary.*

Where the Local has not submitted quarterly reports without just cause, they risk having their rebates withheld until the situation is resolved.

Article 16, Section J: *In the event any Local repeatedly fails to provide Quarterly Report Forms without reason, the Provincial Executive, by two-thirds (2/3) resolution thereof, has the power to suspend monthly rebates until the matter is corrected.*

It is **essential** that three (3) Trustees sign the Quarterly Report before it is forwarded to the Provincial Office. If you require assistance in completing this form, please contact the Financial Secretary at the Provincial Office.

Please ensure your Local has the same Quarterly Report Form as in the sample provided. If not, please order a booklet of forms at no charge.

INSTRUCTIONS ON COMPLETING QUARTERLY REPORTS

The Secretary-Treasurer shall keep an accurate account, and forward a quarterly financial statement, which has been audited by the Local Trustees, to the Financial Secretary.

The Quarterly Report is divided into three (3) sections: Ledger, Bank, Trustees.

Section 1: Ledger

Section 1 of the report, contains numbers (1), (2), (3), and (4). This pertains to information taken from the Local's records such as revenues (Rebates) and expenses (room rental, cell phones costs etc.), bank interest (if any), and stale dated cheques (dated 6 months of more and not yet cashed).

Section 2: Bank Statement

Section 2 of the report has the numbers (5), (6) and (7) which must be completed according to information taken from the bank statement.

The amounts on lines (4) and (7) must be equal. If this figure does not agree with the closing balance on line (4), then this and future reports will not balance. This is very important, as this amount will be carried forward (1) to the next Quarterly Report.

You will also find a section to enter any assets your Local may have acquired, such as term deposits, savings deposits, and bank/equity shares.

Section 3: Trustee Signatures

Section 3 of the report is where the printed names and signatures of the Trustees who have reviewed the Quarterly Report go. It is **essential** that three (3) Trustees sign the Quarterly Report before it is forwarded to the Provincial Office, otherwise the Quarterly Report will be returned to the Local.

The next few pages of this manual will guide you through filling out the Quarterly Report form. **Please use the sample Quarterly Report for reference.**

A **Name of Local:**
This is the name of your Local, not H.E.U.

B **Completed By:**
All Quarterly Reports should be completed by the Secretary-Treasurer or Treasurer of the Local. Please ensure the name is printed.

C **Date Prepared:**
Date the Secretary-Treasurer or Treasurer prepared the Quarterly Report.

D **Report Quarter:**
1st Quarter (January to March), 2nd Quarter (April to June), 3rd Quarter (July to September), 4th Quarter (October to December).

1 **Opening Balance:**
This figure should be taken from your previous Quarterly Report as indicated on line (7) as the Net Bank Balance located at the bottom of the page.
(See previous page for instructions on how this balance is arrived at.)

E **Rebates:**
Any income received by your Local should be reported in this area of the report. List rebates separately in order for the Trustees to immediately identify the rebates which have been received for the three (3) month reporting period.

F **Bank Interest:**
If your financial institution deposits a nominal monthly interest amount into your Local's bank account, please insert one total for the three months during the recording quarter. If your bank does not pay interest, simply leave this line blank.

G **Stale Dated Cheques & Other:** *(If applicable)*
Stale dated cheques are cheques dated 6 months or more that were not cashed. No further action is required if there is no replacement cheque to be written. If your Local has received any other revenue, record this information in the "Other" section, along with a brief explanation.

2 **Revenue Sub-Total:**
Calculate the total of all revenue (E)+(F)+(G)+Other and record the total to line (2).

H **Expenses:** *(Approved by Local Membership)*
The Quarterly Report includes categories for various expenditures which a Local may incur throughout the reporting period. These expenditures must be approved by Local membership at a meeting with quorum and recorded in the minutes of the meeting. List the quarterly totals for each category on the lines provided on the form.

3 **Expenses Sub-Total:**
Calculate the total of all expenses (H) and record the total to line (3).

4 **Ledger Closing Balance:**
This is arrived at by adding the opening balance line (1) to the revenue sub-total line (2) then minus the expenses sub-total line (3). Record the balance as the Ledger Closing Balance on line (4). Line (4) will be carried forward on your next Quarterly Report as line (1).

I **Bank Statement Ending Date:**
The ending date of the bank statement is very important as not all accounts have the same month ending date. Write the exact bank statement ending date as shown on the bank statement.

5 **Balance Per Bank Statement at End of Quarter:**
This is the last balance shown on the bank statement of the reporting quarter.

J **Outstanding Cheques:**
These are cheques written before the end date of the Quarterly Report and have not yet cleared the bank account. These cheques will remain as outstanding until they have cleared the bank.

If there is not enough space to write the outstanding cheques, please write on the 2nd page or attach a separate sheet.

6 **Outstanding Cheques Sub-Total:**
Calculate the total of all outstanding cheques (J) and record the total to line (6).

7 **Net Bank Balance:**
The net bank balance is arrived by taking the figure on line (5) and minus line (6) from it. The resulting figure is then entered on line (7) and must equal the total on line (4).

K **Additional Information if Applicable:**
Here is where you will enter any assets your Local may have acquired, such as term deposits (GIC's), savings and equity shares. The Local is prohibited from investing the Local's money in mutual funds and other fluctuating investments and returns.

If you require assistance in completing your Quarterly Report form, please contact the Financial Secretary at the Provincial Office.

Download this form online: heu.org/heu-locals

HOSPITAL EMPLOYEES' UNION

TRUSTEES' QUARTERLY REPORT

PLEASE PRINT CLEARLY

Local Name: _____ (A)

Completed by: _____ (B)

Date prepared: _____ (C)

Q1: Jan. - Mar. Q3: July - Sept
Q2: Apr. - June Q4: Oct. - Dec. } *Circle Report Quarter* (D)

SECTION 1: *Ledger*

Ledger Opening Balance *(line 4 from last quarter)* _____ (1)

ADD: REVENUE

	DATE RECEIVED	AMOUNT	
Rebates			(E)
Bank interest			(F)

Stale dated cheques *(cheques dated 6 months or more and not yet cashed)*

Cheque #		(G)
other (explain)		→ _____ (2)

DEDUCT: EXPENSES *(Must be approved by Local memberhsip meeting with quorum)*

Bank Charges	(H)
Cell Phone/Internet	
Donations	
HEU Convention Expenses	
Honorariums	
Local Building	
Local Bursaries	
Local Events (explain)	
Local Meeting Expenses	
Member Education (Wages & Expenses)	
Office Supplies	
Per Capita Expenses (Labour Council)	
Retirement Gifts/Goodwill	
Other Expenses (explain)	→ _____ (3)

Ledger Closing Balance = (1) + (2) - (3) _____ (4)*

SAMPLE FORM

SECTION 2: *Bank Statement*

Name of Bank/Credit Union: _____

Address: _____

Bank Statement Ending Date: _____ (I)

Bank balance at end of quarter (per bank statement) _____ (5)

DEDUCT: Outstanding cheques (issued & recorded in the ledger but not yet cashed)

Cheque #	$	(J)
		→ _____ (6)

Net Bank Balance = (5) - (6) _____ (7)*

**(4) must equal (7)*

Additional infomation (if applicable) (K)

Savings Deposit _____

Term Deposit _____

Bank/Equity Shares _____

SECTION 3: *Trustees Signature*

As trustee of the Local, I have examined the books and ensure that this Quarterly Report was completed correctly and that all information is accurately reflected for the Local's actvities.

Trustee: ① _____	② _____	③ _____
(Signature)		
_____	_____	_____
(Print Name)	*(Print Name)*	*(Print Name)*

LOCAL UNION FUNDS

Locals are reminded about the importance of "responsible spending" of Local funds.

Please refer to the "**Criteria for Use of Local Union Funds**" section to make it easier for Local Executives to determine what they may or may not spend money on, within these guidelines.

HEU's finance department processes each Local's Quarterly Reports and issues "union dues rebate" deposits to your Local's bank account. The money is to be used to strengthen your Local's membership – including training and educational opportunities, bursaries, office supplies, community outreach, wage replacement for union business, as well as attendance at conferences and conventions.

All Local expenditures need to be approved at a Local membership meeting with quorum, and the decisions must be recorded in your Local meeting minutes.

If you have any questions, please contact the Financial Secretary at the Provincial Office prior to making the expenditure.

CRITERIA FOR USE OF LOCAL UNION FUNDS

All Locals shall use union rebate funds for union purposes such as:

- Bursaries
- The payment of per capita to Labour Councils
- Local education
- Sending additional members to regional meetings
- Adopting a smaller Local to send additional members to regional meetings
- Reimbursement of members' lost wages to employers for Local union business (Do not pay wages direct to members. Steward time should be the employer's responsibility.)
- Office expenses (postage, telephone, facsimile, internet, administrative fees to financial institutions)
- Expenses for meetings of the Local Executive and Local committees
- Financial support for the trade union movement & social justice movement
- Rental of meeting rooms
- Printing supplies, office equipment and printing fees
- Local campaigns against privatization, contracting out and P3's
- Local participation in social justice and coalition work and community outreach
- Reasonable social events in consultation with the Financial Secretary
- Payment of honorariums within the Canadian Revenue Agency guidelines (*refer to the honorarium section of this manual.)
- Special campaigns approved by the Provincial Executive
- All other expenses approved by the Provincial Executive
- Encourage door prizes to be HEU boutique items or other union produced products
- No "hardship" cases

Spending of Local union funds must be approved at a Local general membership meeting with quorum and the decisions must be reflected in the official minutes of Local meetings. Locals may adopt Local By-Laws authorizing the Local Executive to pay regular re-occurring expenses such as phones and meetings rooms.

Locals are also required to make sure that their Local By-Laws have been approved by the Provincial Executive and are on file with the Provincial Office.

HONORARIUMS

Honorariums fall within the "Criteria for Use of Local Union Funds" and are considered an appropriate use of rebates.

A Local may choose to pay their Local Executive Officers an honorarium. These must be approved by the membership at a meeting with quorum. There is no set criteria on the honorarium amount, however, it needs to be reasonable depending on the size of the Local, the amount of work involved, and the hours spent doing that work.

Honorariums are taxable as the Canadian Revenue Agency considers Employment Income as consisting of amounts you receive as salary, wages, commissions, bonuses, tips, gratuities, and honoraria.

At year end, the Secretary-Treasurer must issue a statement of honorariums paid to all Local Executive Officers who received an honorarium. Local Executive Officers must declare the honorarium income on their income tax return.

The Canadian Revenue Agency defines an honorarium as:

> *"An honorarium is a voluntary payment made to a person for services for which fees are not legally or traditionally required. An honorarium is typically used to help cover costs for volunteers or guest speakers."*

DIRECT DEPOSITS

The banking institution which the Provincial Office deals with is the Community Savings Credit Union. Locals are encouraged to have their account with Community Savings Credit Union. This can be arranged by contacting the Financial Secretary. This eliminates the necessity to physically attend the bank or credit union when signing officers change. The Provincial Office will be administering the direct deposits, based on the information HEU has received back from the Locals on the authorization forms.

If your Local does not deal with Community Savings Credit Union and your Local changes their banking Institution or signing authorities, the Financial Secretary at Provincial Office ***MUST*** be notified ***IMMEDIATELY*** in order for the Finance Department to make the changes.

Please refer to the "**Direct Deposit Banking Information for Rebates**" form which must be signed by the Chairperson and Secretary-Treasurer and submitted to Provincial Office after the completion of yearly local elections (necessary only if changes in Local positions have occurred), or change in banking institutions.

Download this form online: heu.org/heu-locals

HOSPITAL EMPLOYEES' UNION

DIRECT DEPOSIT BANKING INFORMATION FOR REBATES

DATE: _____

LOCAL NAME: _____

SECRETARY-TREASURER'S NAME: _____

CHAIRPERSON'S NAME: _____

NAME & POSITION OF THREE (3) SIGNING OFFICERS: (Please print)

	Name	Local Position
1.	_____	_____
2.	_____	_____
3.	_____	_____

SAMPLE FORM

ATTACH COPY OF LOCAL'S VOID CHEQUE

(If not previously submitted)

_____ _____

Signature of Chairperson **Signature of Secretary-Treasurer**

NEW LOCALS

Financial assistance is available to new Locals to help support and carry on the business of the Local until such time as a collective agreement has been established.

In order to access the funds, a bank account in the Local's name will need to be set up with Community Savings Credit Union. The Provincial Office has worked with Community Savings Credit Union to offer Locals a banking solution that works well with our structure and does not have high banking fees. The great thing about Community Savings Credit Union is that they understand how the HEU and other Unions work, as well as our local election process. They can provide an online account eliminating the necessity to physically attend the bank/credit union when signing officers change. Setting up your account with Community Savings Credit Union can be arranged by contacting the Financial Secretary.

You must complete the "**Direct Deposit Banking Information for Rebates**" form which must be signed by the Chairperson and Secretary-Treasurer and submitted to Provincial Office. These signing officers are usually but not always, the Chairperson, Vice Chair and the Secretary-Treasurer. **Trustees cannot be signing officers at the Local level.**

Once your Local has opened an account with Community Savings Credit Union, a copy of a void blank cheque must be submitted as soon as possible. This will provide the banking information required in order for us to deposit the initial $300.00 cash float as well as future rebates once the collective agreement is in place.

Locals receiving cash floats must comply with the Quarterly Reports submission with the additional requirement of receipts to be submitted along with the Quarterly Report for float replenishment. Absence of receipts may result in being denied reimbursement.

REBATES

The Hospital Employees' Union's Provincial Office makes monthly direct deposits for rebates to each Local. The structure of the rebates is based on the dues check-off, submitted by the Employer. The rebates are calculated on the average number of dues-paying members on a monthly basis.

In accordance with your collective agreement, remittance of dues check-off by the Employer is due not later than twenty-one (21) days after the date of deduction. For example, January dues deducted from members must be payable to the Provincial Office not later than the end of February, in which case, based on these figures, the rebates are calculated and issued in the month of March or sooner depending on the date of dues received. The rebates are generally two (2) months rolling behind, due to the structure. However, a Local will generally receive twelve (12) direct deposits in a year.

As per ***Article 2, Section B,*** rebates payable to each Local is as follows:

Local Members	Rebates Per Month
0-50 members	$100.00
51-79 members	$150.00
80-119 Members	$225.00
120-150 members	$275.00
150+ members	$1.85 per dues paying Member

The monies remitted to the Locals are for the running of the Local as approved by the Local membership. The Constitution requires the monies received and spent are reported on the quarterly reports submitted to the Provincial Office.

Please refer to the "**Direct Deposit Advice/EFT Cheque Remittance Notice**" that is forwarded to your Local each month. This notice is to advise your Local of the rebate amount deposit made into your bank account as well as the member count and the month and year on which the rebates were calculated, based on the average dues paying members in that month.

The direct deposits for your Local are to be deposited or transferred on the 15th of each month, and once the transfer has been made by the Provincial Office, the advice notice is sent by email from eft@heu.org. These Direct Deposit Advice/EFT Notices should be kept with your Local's records for use by your Trustees.

Locals will be notified in accordance with the resolution passed at Convention, as to the number of members and the month of the calculations.

Cheque Remittance

HEU

HEU SAMPLE LOCAL
1234 Address
Someville, BC
V5J 5M3

Vendor ID	Vendor Name	Payment Number	Cheque Date	Cheque Number
1234	HEU SAMPLE LOCAL	0123456	03/19/2020	EFT000000000000

Our Voucher Number	Description	Date	Amount	Amount Paid
0123456	Rebate 01/2019 - 276 members	02/28/2019	$510.60	$510.60
			Total	**$510.60**

CONVENTION REGISTRATION FEES

The purpose of including this in your manual is to inform you that there is a charge of $50.00 per delegate to the Biennial Conventions of the Hospital Employees' Union. As this is a cost factor and the responsibility of the Local, it is intended for reference material only.

Article 5, Section D states:

> *"A Convention Registration Fee of Fifty Dollars ($50.00) per Delegate shall be paid by each Local on behalf of its Delegates and this fee shall be deducted from the Local's rebates in the month following when Credentials are submitted to the Provincial Office, Burnaby site".*

BARGAINING CONFERENCES REGISTRATION FEES

A similar fee is charged for the Facilities Bargaining Association, Community Health, and Community Social Services bargaining conferences.

Facilities Bargaining Association:

Article 9, Section A (3):

> *"A Registration Fee of Fifty Dollars ($50.00) per Delegate shall be paid by each Local on behalf of the Delegates and this fee shall be deducted from the Local's rebates in the month following when registration forms are submitted to the Provincial Office, Burnaby Site".*

Community and Community Social Services:

Article 9, Section B (3):

> *"A Registration Fee of Fifty Dollars ($50.00) per Delegate shall be paid by each Local on behalf of its Delegates and this fee shall be deducted from the Local's rebates in the month following registration".*

DEFINING MEMBERSHIP

Article 5, Section C:

> *"For the purpose of defining Membership in this Section, the Dues Check-Off List and the List of Members on LTD shall constitute a Local's Membership total."*

PER CAPITA – LABOUR COUNCIL

As per ***Article 22, Section C,*** the Per Capita for Locals of one hundred (100) members or less, who are affiliated to their local Labour Council, shall have the Per Capita paid by the Provincial Office.

Included in this section of your manual is a copy of a Per Capita Cheque Requisition form, which is to be completed and submitted to the Provincial Office, for reimbursement.

Please note it is **essential** Labour Council receipts be submitted along with the ***Per Capita Cheque Requisition*** form. All reimbursements will be paid through the Local's direct deposit rebates.

Per Capita payments should be made by the Local to the Labour Council directly to maintain local autonomy for Labour Council status.

Download this form online: heu.org/heu-locals

HOSPITAL
EMPLOYEES'
UNION

PER CAPITA
CHEQUE REQUITISTION

(For Completion and Return to Provincial Office – Finance)

Name of Local: _____ **Date:** _____

Address: _____ **Amount:** _____

Name of Labour Council: _____

Date Affiliated: _____

Number of Members: _____

Cost Per Member: _____

Total Per Capital Costs: _____

Payment for Month Of: _____

Requested By: _____

SAMPLE FORM

PLEASE ATTACH LABOUR COUNCIL RECEIPT

FOR FINANCE OFFICE USE ONLY

Authorized By: _____ **Dated:** _____

TAB THREE

Trustees

DUTIES OF THE 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 when approved, must sign off on the completed Trustees' Quarterly Report form. By signing the Quarterly Report, the Trustee takes full responsibility of what is reported.

They must ensure the Quarterly Reports are completed correctly and all information is accurately reflected for the Local's activity. Once all three (3) Trustees have reviewed and signed, the Secretary-Treasurer will then mail the reports to:

Hospital Employees' Union
Attention: Finance Department
5000 North Fraser Way
Burnaby, BC V5J 5M3

The Trustees must ensure the Secretary-Treasurer deposits all money belonging to the Local in a Credit Union or Chartered Bank as the Local may designate. They shall also perform such other duties as the Provincial Executive, the Local or the Constitution may direct.

The Trustee receiving the highest number of votes in the election meeting shall serve a two (2) year term; the other shall serve a one (1) year term.

***Article 16, Section E** states:*

> *On an annual basis the Local Trustees complete a survey of the Local's finances and present the findings of this survey to the Membership at the Local meeting.*
>
> *The survey will be designed to assist in a positive manner as a way of assisting in reporting the finances of the Local to the Membership.*

Trustees cannot be signing officers on the Local's bank account.

CHECKLIST FOR LOCAL TRUSTEES

1. Quarterly Report

- ☐ Reviews the last Quarterly Report submitted for ending balances.
- ☐ Ensures that the closing balance of Quarterly Report is carried forward to the new Quarterly Report.
- ☐ Confirms that the ledger closing balance and net bank balance must equal each other.
- ☐ Verifies that 3 Trustees have signed the Quarterly Report before sending to the Provincial Office.

2. Ledger Book

- ☐ Reviews the ledger entries and totals per column for both revenue and expenses.
- ☐ Accumulates revenue and expense totals as necessary.

3. Bank Statements

- ☐ Confirms amounts to Quarterly Report numbers.
- ☐ Declares term deposits, bank interest, if necessary.

4. Cheques

- ☐ Reviews cheques to confirm they are in numerical and chronological order.
- ☐ Ensures there are no pre-signed cheques.

5. Receipts

- ☐ Verifies expenses are reimbursed according to receipt amounts.
- ☐ Ensures there are receipts for every cheque issued.

6. Local Meeting Minutes

- ☐ Confirms all expenses have been approved by the membership meeting with quorum and all expenditures have been recorded in the meeting minutes.

TRUSTEES' QUARTERLY REPORT

The Quarterly Report is divided into 3 sections: Ledger, Bank Statement and Trustees Signatures.

Section 1 of the report is the Ledger. This pertains to information form the Local's records, rebates (direct deposit advice), bank interest (from the bank statement), and stale dated cheques.

Section 2 of the report is the Bank Statement. These number are taken from the bank statement at the end of the quarter being reported.

Here are some common issues for review:

- **Bank Statement Ending Date:** The ending date of the bank statement is very important. Not all bank accounts have the month end as the statement ending dates. Ensure that the exact date shown on the bank statement is correctly reflected on the Quarterly Report
- **Outstanding Cheques:** These are cheques that were written before the end date of the Quarterly Report that have not yet been cashed. They will remain as outstanding on the report unless they become stale dated, 6 months after the date they were written.

Section 3 of the report is where the printed names and signatures of the Trustees who have reviewed the Quarterly Report go. It is **essential** that three (3) Trustees sign the Quarterly Report before it is forwarded to the Provincial Office, otherwise the Quarterly Report will be returned to the Local. By signing the report, the Trustees confirm that they have examined the books of the Local, verified all revenues and expenses, minutes of meetings approving expenditures, and that the report accurately reflects the financial activities of the Local in that quarter.

In the event there is a Trustee who is away on vacation or other extended leave, the Local may decide to wait until the Trustee has returned or call another elected officer who is not a current signing officer on the Local's bank account to sign the report provided they perform the required review process.

Please use the "Sample Quarterly Report" and the "Instructions on Completing Quarterly Reports" section in this manual for reference.

TAB THREE

Policies, Procedures and Publications

HOTEL ACCOMMODATION FOR HEU SPONSORED EVENTS

Members who attend a Union sponsored event are expected to travel home upon adjournment wherever possible. When members choose to drive, any added costs over the cost equivalent of airfare such as hotels, per diems, wages, etc will not be the responsibility of HEU. The HEU travel policy will be sixty kilometres or ninety minutes to be entitled to accommodation.

The Provincial Executive adopted a new Travel Policy on January 25, 2019 and this policy can be found in the HEU Policy and Procedures manual.

The Provincial Executive is responsible for implementation of this resolution which necessitates addressing the meaning of "out of town" for the purposes of this resolution, keeping in mind that the clear intent of the resolution, based on the debate at the 2018 convention, is to prevent hardship and ensure the safety and wellbeing of members who attend union events.

Members travelling from out of town for a union event are expected to be able to arrive at the venue at a reasonable time the evening before, when the event is scheduled to begin the following morning.

If the members would require time off the day before from a scheduled shift (either a full shift or part of a shift) they may request union leave for the reasonable amount of time needed for travel.

For events scheduled to begin in the evening members are expected to arrive in sufficient time to register and check-in to their hotel. Should the time to travel to the event require leave from a shift (or part thereof) they should request union leave.

Members are expected to travel home at the end of an event on the same day if they are able to reach their home at a reasonable hour. If that is not possible, the member may apply for union leave for all or part of a shift (as appropriate) for the reasonable amount of time needed for travel on the following day.

The Financial Secretary has discretion to deal with special circumstances.

Note: Where possible, if the following day is not a scheduled day of work, members should travel home even if they do not arrive until later in the evening. For example, if a member is flying home to Campbell River and taking a cab from the airport and will be home before midnight, they should do so. However, if a member is flying to Prince George and faces an hour drive from the airport in unsafe winter driving conditions at night, they should instead return home the following day.

Per the Rest Day policy, Rest Days WILL NOT APPLY to travel days unless a full day of travel is required.

Download this form online: heu.org/heu-locals

DEPENDENT CARE – CHEQUE REQUISITION

Name:		SIN:	
Address:			
Street	*City*		*Postal Code*
Telephone:			
Home	*Work*	*(Ext)*	*E-Mail Address*
Local:	Facility Name:		
Union Function:	Date(s):	Location:	

Names of Dependents	Ages of Dependents

Caregiver's Name:	Relation to Member:	
Address:		
Street	*City*	*Postal Code*
Telephone:		

Date of Claim	Hours of Dep. Care Outside of Work Hours			Amount/Hour	Daily Claim	
	From	*To*	*No. of Hrs.*			
			TOTAL CLAIM:			

I confirm that the above information is accurate and is in accordance with the HEU Dependent Care Policy and authorize HEU to contact the caregiver for confirmation

Signature:	Approved By:
Vendor No.	CODE:

BE SURE TO ATTACH YOUR RECEIPT

Revised Jan. 10, 2019

SAMPLE FORM

Download this form online: heu.org/heu-locals

REVISED HEU DEPENDENT CARE POLICY

EFFECTIVE NOV. 6, 2016

HEU Policy on Dependent Care While at Union Functions

HEU strongly encourages all members to play an active role in the Union. HEU recognizes that our members have family responsibilities that they balance with work and union activity. This Dependent Care Policy is one way to help with that balance and eliminate some of the barriers that prevent members with family responsibilities from participating fully in their Union.

- This policy applies to participation at all provincially sponsored HEU functions.
- Wherever possible and where there is sufficient need, HEU will provide quality, on-site childcare.
- HEU will reimburse receipted off-site dependent care costs, over and above the cost of normal expenses incurred for work, up to $10.85 per hour to a maximum of $160.00 per family for a continuous 24 hour period.
- For the purposes of dependent care while participating in union functions, a dependent is either a member's own or their spouse's children, if they are under the age of 16 and reside with the member full or part time.
- Also, a dependent may be any person, regardless of age, who is dependent on the member's care because they are mentally or physically challenged, or parents, grandparents and elder relatives requiring the member's assistance in day-to-day living.
- A spouse includes common-law and same sex partners.
- Reimbursement will not be made to a member's spouse or to a parent or sibling of the dependent or to a person living at the same address.
- In recognition of unique dependent care and special care needs, exceptional circumstances will be considered.

SAMPLE FORM

Procedure

- A Dependent Care Cheque Requisition form must be completed in full and submitted as part of the member's expense claim in order to receive reimbursement
- The form must include the care giver's name and address and a signed receipt must be attached
- The names and ages of dependents must be listed, including their relationship to the member
- There will be no cash reimbursement of dependent care expenses
- In order to comply with Canada Revenue Agency regulations the Dependent Care Cheque Requisition form must be signed by the member as being accurate
- A T4A form will be provided to the member at the end of the year as dependent care reimbursement must be declared as income
- Requests for reimbursement for exceptional circumstances must be made to the Financial Secretary. The member will be notified within 72 hours if the request is denied and of their right to appeal. The member may appeal to the Provincial Executive and the member will be notified of the PE decision within 24 hours of the last day of the PE meeting

BURSARIES

As per ***Article 22, Section B***, monies used for bursary purposes shall be administered by a Bursaries Committee under the direction of the Provincial Executive.

The Bursary Committee is comprised of:

- The Provincial Trustees and
- The Financial Secretary

Present members of the Hospital Employees' Union, as well as their children, stepchildren, children under the legal guardian, and spouses (including common-law spouses and same sex partners), shall be eligible for bursaries. These Bursaries are offered on an annual basis and shall be tenable at any post-secondary educational institution. The Bursary notices are sent out from the Provincial Office in May or June of each year.

Currently, we have thirty nine (39) Bursaries available. Bursary applications may be obtained from the Provincial Office or from the HEU Website, once the notice has been released to the Locals.

In accordance with the Constitution and By-Laws, all applicants shall be notified in writing as to whether or not they have been accepted as a recipient of an HEU Bursary prior to the commencement of the school term.

A list of successful applicants shall be published in the Guardian.

LABOUR STUDIES COURSES

For many years the Hospital Employees' Union has endorsed and supported labour studies programs across Canada through various other organizations such as Capilano University, Labour Councils, BC Federation of Labour, CLC, CUPE, etc. These courses, which range from labour law, human rights, occupational health and safety and stress management, provide valuable labour education. They are usually held in the evening or on weekends, depending on the level of training required, and complement the extensive educational programs HEU offers.

At the March 2017 Provincial Executive meeting, your Provincial Executive voted to change the existing policy to increase the amount of the registration fee(s) reimbursement for labour studies courses held by other organizations to $500.00 per member per year.

The change allows more access to members outside of the Lower Mainland and allows up to a cumulative maximum fee of $500.00.

Please note registration or tuition fee(s) will be reimbursed upon receipts to the Financial Secretary. All other costs such as wage replacement, accommodation, transportation, per diems and cancellation fees must be covered by either the member personally or their Local.

Please check with the Financial Secretary prior to taking a labour study course to confirm the course will be reimbursed.

DUES

At the Nineteenth (19th) Biennial Convention of the Hospital Employees' Union there was an emergency Constitutional Amendment submitted that was adopted by the delegates, which states that in ***Article 2, Section A, Dues***, the first paragraph be replaced by:

> *"...Union dues shall be 2.1% of the gross salary."*

The Constitution and By-Laws also states that, except by special dispensation consisting of a two-thirds (2/3) affirmative vote of the Provincial Executive, all membership dues, initiation fees and assessments shall be paid through the membership check-off. Any member who, without a reason acceptable to the Provincial Executive, is three (3) or more months in arrears of dues, initiation fees, or assessment payments, shall automatically lose their status as a member.

It should also be pointed out that on the ***Application for Membership***, it states that Employers have the authority to take 2.1% of gross salary as shown in the Wage Schedule.

INITIATION FEES

As per ***Article 2, Section A***, the Initiation Fee for the admittance of all new and former Members shall be Five Dollars ($5.00) per Member and shall be deducted from the new Member's pay cheque at the time of the first deduction for Union Dues.

The Initiation Fee shall apply in all cases, unless the Employee can produce a Membership Card from the Hospital Employees' Union.

It is the responsibility of the Employer at the facility to deduct this Initiation Fee and to submit it to the Provincial Office.

If a member came from a Union affiliated to the Canadian Labour Congress, they are exempt from paying the $5.00 Initiation Fee.

When organizing takes place, the initiation fee will not be deducted until such time a Collective Agreement has been negotiated. The collection of the initiation fee will be the responsibility of the Employer.

FULL PARTICIPATION POLICY

- Delegates are required to confirm full participation in the entire Convention or HEU sponsored events, with the exception of other events at which the member is representing HEU.
- Members are expected to attend all sittings of Convention sessions, (all Conventions, not just HEU) regardless of their work schedule
- Attendance to social evening events is encouraged
- Members attending Conferences or Conventions will be teamed up as a "buddy system" with a member of the Provincial Executive
- Wages and per diems will not be paid to members who do not attend without a valid reason
- If a member shows up late and/or leaves early this Policy shall also apply

- Members attending functions must be prepared to report to the membership on the events which they attended as a means of being accountable to the membership
- The representing Local will be advised if members violate this Policy
- Members may apply for special dispensation to the Financial Secretary or designate

NO SHOW POLICY

Members that are "No Show" to HEU events, and do not contact the Union to cancel, will not be considered for future HEU educational opportunities or opportunities to attend external conferences such as the BC Federation of Labour or CUPE for a period of one (1) year.

Members attending Union sponsored events will be teamed up as a "buddy system" with a Provincial Executive member or another member.

Members may apply for special dispensation to the Financial Secretary or designate.

Members accused of violating the HEU "No Show" policy shall be given full disclosure of the accusations against them, and an opportunity to defend themselves before any decisions are made, and that a full investigation be conducted before any subsequent punishment is given out.

RETIRED MEMBERS

Article 25 states:

> ***Section A***
> ***ORGANIZATION OF RETIRED MEMBERS:*** *An organization of Retired Members shall be formed with voluntary membership on the payment of Five Dollars ($5.00) per year. This Organization shall be organized by and have assistance from the Provincial Office, Burnaby Site.*
>
> ***Section B***
> ***RETIRED MEMBERS IN GOOD STANDING:*** *Retired Members will be deemed Members in good standing upon written notification to the Provincial Executive, having recorded attendance at the required number of Local meetings, and payment of a yearly dues of five dollars ($5.00). As such, they may represent their Locals as delegates to Labour Councils and other organizations to which their Local belongs and may serve on non-employer committees at the discretion of the Local Membership.*

LOST WAGES ON UNION BUSINESS

We want to encourage HEU members to be or to get involved in our Union and that is why the HEU will reimburse members up to full-time hours per shift only, regardless of where they are delegated from, provided the site is an HEU certification.

Members are required to fill out a Personal Salary & Expense Voucher for each event they have attended.

TAB FIVE

Contact Us

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

Okanagan Office
100-160 Dougall Rd. South
Kelowna, B.C. V1X 3J4
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

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