
SUMMARY OF RECOMMENDATIONS

A. MEMBER SERVICES

1. GRIEVANCES

- A. The roles of the Local, Region and National Office to be clarified and differentiated. In general, the handling of individual grievances should be pushed down to the locals and regional offices, and the National Grievance Officer should focus more on strategic and system issues. Specifically:

The Local Union should have primary responsibility for handling grievances:

- ensuring that grievances are well founded and well documented
- assisting members by helping them prepare grievances
- keeping the Region informed as grievances are filed

The Region should:

- provide assistance to small local unions as needed
- train and make widespread use of local worker advocates
- provide advice to other locals as needed
- monitor grievances across the region, and ensure quality control
- maintain a record of all grievances in progress
- help local unions learn from each other and take up best practices
- make regular reports to the National Grievance Officer (NGO) on grievances
- make recommendations to NGO for policy grievance

The Grievance Department at national level to be limited to six key functions:

- monitoring grievances across the system in preparation for negotiations
 - developing a nationwide grievance strategy
 - providing advice to regional officers
 - assisting regions to learn from each other and taking up best practices
 - preparing policy grievances, based on consultation with regions
 - scheduling grievances
- B. In accordance with these changes, the staff of the grievance department at national level to consist of three people plus appropriate administrative staff.
- National Grievance Officer
 - 2 NURs (one English, one French)
- C. The Grievance Department at National Office, including the NURs, to operate under the overall direction of the National Grievance Officer.
- D. The National Grievance Officer should review the current policy of automatically filing “attendance” grievances. Attendance grievances currently account for a large percentage of total grievances and is costly for the Union, but are almost always set aside. A more efficient approach to responding to attendance issues should be considered.

2. DEMAND SETTING AND NEGOTIATIONS

A. Urban Operations

Demand setting process has already been simplified by abolition of area councils. We recommend the CUPW try out this new process and evaluate it after next round.

The management of the collective bargaining process should be delegated to a sub-committee of the NEB, headed by a member of the NEC.

B. Rural and Suburban Mail Carriers (RSMC)

We recommend that the RSMC be integrated into the urban operations collective agreement as soon as feasible.

C. Private Sector Bargaining Units (PSBU)

We recommend that for PSB units with fewer than 100 members, the National Director of the region be authorized to approve demands, authorize a strike and direct negotiations. The National Director is obliged to keep the National Secretary-Treasurer advised of potential financial implications for CUPW.

3. EDUCATION

- A. Replace two NUR positions in the National Office with one bilingual specialist in curriculum development working under the direction of the 2nd National Vice-President. In addition to expertise in course design, the specialist should also have the skills required to train regional education representatives and selected member facilitators in course design and adaptation.
- B. Enhance the role of the Education URs beyond regional course logistics to include educational needs assessment of locals, assistance to locals with the design and facilitation of short courses, and support to member facilitators in the region.
- C. Maintain the national Union education program but reduce the costs through reducing the length, changing the locale etc.
- D. Clarify and tighten selection procedures for national and regional education programs by making the criteria transparent and ensuring that there is a consultative mechanism between the region and the locals to review selection of both participants and facilitators.
- E. Make better use of a national tracking system for course participants. A system has already been developed at the national level for tracking participants in specific courses so that no member would be permitted to take the same course twice. This system requires implementation across the Union.

- F. Target regional and national education to those who have taken or are about to take on specific roles within the Union.
- G. Ladder the education program so that there is a logical sequence of courses with pre-requisites attached to advanced courses.
- H. Undertake one or two e-learning experiments to test this approach as a means of increasing the number of members able to access the Union education program.
- I. Make better use of, and continue to develop member facilitators, involving some of the more experienced in curriculum design activities at both national and regional levels. CUPW has built an impressive group of member facilitators; however, this resource is not being used to its' full potential in some regions.

4. NATIONAL COMMUNICATIONS

- A. The National President should have overall responsibility for the communications function.
- B. He or she could designate one person to control and co-ordinate the flow of information including the website, bulletins and national publications to members/locals across the country.
- C. Under the direction of the National President, the Union should undertake a strategic review of national publications, including bulletins, to find out who reads them, what impact they have, how well they serve the membership, and what changes in delivery methods (including electronic methods), content or frequency, would best serve the needs of the members and local activists.

B. NATIONAL STRUCTURE

5. THE NATIONAL PRESIDENT'S OFFICE

- A. The National President to have overall authority to assign work and responsibilities to the individual officers of the NEC, where not specifically stipulated in the constitution.

- B. The National President to have responsibility for communications – both inside the Union and with the outside.
- C. The National President to have responsibility for the international work of the Union.
- D. The National President to have the authority to hire an Executive Assistant on a contract for a period of time to coincide with the mandate of the National President. Preferentially, but not necessarily, to be hired from within the Union membership. The Executive Assistant can be assigned to other tasks at the discretion of the National President.

6. ROLE AND FUNCTIONING OF THE NATIONAL EXECUTIVE COMMITTEE AND NATIONAL BOARD OF DIRECTORS

The National Executive Committee Officers

- A. The National Executive officers should have the authority, and responsibility, for carrying out the duties assigned to them by the constitution.
- B. They also have a responsibility as members of the National Executive Committee for the collective leadership of the Union.
- C. Individual National Executive officers should each have the budgetary resources necessary for the accomplishment of their specific tasks, and should be accountable to the Union for the execution of those functions. The budget for each Executive officer should be prepared by the National Secretary-Treasurer and adopted by the National Board of Directors.
- D. Individual National Executive officers should have the authority to spend monies within their budget up to an amount of \$10,000. Any expenditure in excess of that requires the approval of a majority of the National Executive Committee.
- E. Where the Constitution does not clearly stipulate responsibilities, or in the case of ambiguities, the National President should assign specific duties to individual officers.
- F. Each National Executive officer should be accountable to the National Board of Directors for the accomplishments of their individual offices, and for the management of the budget which they have been assigned. They must make a report to the National Board of Directors on a regular basis.

- G. Each National Executive officer should have overall responsibility for providing direction to NURs, specialists and administrative staff working in their individual areas of responsibility.
- H. The National Executive officers, including the National President, should take management training (including human resource and financial management) within three months of election.

The National Board of Directors

- A. The National Board of Directors (NBD) is the highest policy making body in the Union between conventions. It has the power to override decisions by individual Executive officers, including the National President.
- B. The NBD is not an administrative body – its function is to debate strategic direction, provide policy guidelines to the Executive officers and to hear reports from individual officers in the execution of their mandate.
- C. The National Board of Directors will meet four times a year for two days at the National Office.
- D. The NBD will consist of 23 members as follows:
 - i. National President
 - ii. 6 National Executive Officers
 - iii. 6 Regional Vice-Presidents
 - iv. 3 Presidents of largest locals
 - v. 1 representative of RSMC
 - vi. 1 representative of Groups 3 & 4
 - vii. 4 representative of Equity seeking groups
 - viii. 1 representative of the PSBU
- E. The minutes of the National Board of Directors will be noted and made available to the general membership. (However, in specific cases, the NBD will have the right to move to in-camera session.)

7. THE ROLE OF THE NATIONAL CONSTITUTION

- A. One member of the NEC be assigned to undertake a full review of the Constitution to reduce or eliminate excessive detail and contradiction, clarify ambiguities, and eliminate items that by common agreement, no longer apply to the current situation.
- B. The current CUPW Constitution be separated into three separate documents:
 - i. A basic National Constitution, (to be approved/amended by convention);
 - ii. National Policies, (which can be adopted by NBD or convention);
 - iii. Administrative Regulations (which can be adopted by NEC).
- C. Rewrite the Constitution in “clear language”. The CLC has done a clear language Constitution so there is a model to learn from.
- D. Put Constitution (and policies) on the Internet, and reduce dramatically the number printed. (Print and mail only the number of copies requested by locals).

8. FINANCIAL ADMINISTRATION (INCLUDING THE ROLE OF THE NATIONAL BOARD OF TRUSTEES)

- A. Review and prepare options for a different dues system that could reflect the wages of different kinds of workers, including PSBU, and temporary workers , keeping in mind the decision made by CUPW to organize new members.
- B. Move to an “activities-based budgeting approach”, where the Union debates its priorities and decides what resources it wants to apply to each of them, and assigns authority and responsibility to specific officers to carry out the tasks.
- C. Increase transparency by the creation of separate budgets for such priorities as: education, grievances, human rights, international solidarity, etc., and giving an accounting to the membership each year on how these monies have been spent.

- D. In order to properly resource this new approach to financial administration, the Director of Finance position should be separated from ongoing office administration.
- E. Create a new position of Office Manager, to deal with administration of the office, including human resource administration. The Office Manager to report directly to the National Secretary-Treasurer.

RECOMMENDATIONS ON THE NATIONAL BOARD OF TRUSTEES COMMITTEE (NBT)

- A. The mandate of the National Board of Trustees should be to hear the report of the auditors and report to the National Board of Directors recommending new policies and regulations as appropriate. (It should NOT be to go over the individual expense items in the budget.)
- B. The mandate of the auditors should be to verify that expenses have been handled in line with the Union's National Constitution and policies. The auditors should be also mandated to include recommendations to improve overall financial management.
- C. The size of the National Board of Trustees should be reduced to three people, elected at convention.

9. THE ROLE OF UNION STAFF AT NATIONAL OFFICE (INCLUDING NURs AND SPECIALISTS)

- A. All National Executive officers should take at least three days of management training (including financial administration and human resource management) within three months of being first elected to National Office.
- B. Clarify the responsibilities of National Executive officers. In areas of overlap or confusion, it shall be the responsibility of the National President to allocate files or responsibilities.
- C. Clarify reporting relationships for NURs. NURs should carry out their work "under the direction" of the appropriate national officer.
- D. Clarify reporting relationships for specialists. Specialists should carry out their work "under the direction" of the appropriate national officer.

- E. Every CUPW employee (NUR, specialist or administrative staff) should have a conversation with the responsible Executive Officer at least once a year to evaluate their contribution to the organization and discuss approaches to improvement.
- F. In recruiting for all temporary positions, clear job descriptions should be drafted, and a transparent, objective process should be used.
- G. CUPW should develop a contingency plan for “temporary” staff whose work is dependent on funds from the employer derived from special agreements under the collective agreement.

10. THE ROLE AND FUNCTIONING OF THE UNION’S NATIONAL COMMITTEES

- A. The National Secretary-Treasurer to establish an estimate of the annual costs of each of the five national committees.
- B. The National President should ask the National Executive officer leading each committee to carry out a review of the committee’s work and effectiveness, and to identify better approaches to accomplishing the objectives of the Union in each area using the same spending base.
- C. On a going forward basis, the National Executive officer in charge of each area (Health and Safety, Women’s rights, etc.) should submit an annual budget for the accomplishment of the tasks, including a budget, if any, for a national committee.

11. ORGANIZING THE POSTAL SECTOR

- A. CUPW should carry out an internal review of its success and failure in organizing outside CPC over the last year. This review should include an analysis of whether it makes sense **FINANCIALLY** for the union to continue to dedicate resources to this objective.
- B. If the answer to the above question is “YES”, at the national level, the Union should hire a chief organizer. (i.e. this should not be an elected position).

- C. The decision to launch a campaign in a specific worksite should be made by the Regional Vice-President. If the Regional Vice-President does not feel the chances of success are great enough, no campaign should be launched.
- D. Regional Vice-Presidents should be asked to make a report on organizing in their region to the National Board of Directors on an annual basis.

C. REGIONAL STRUCTURE

12. THE NUMBER AND STRUCTURE OF REGIONS

- A. The number of regions to be reduced to six, by reducing Ontario to two regions and Quebec to one region. This reduction should take place through a series of discussions in each province on how to best provide services to members.
- B. Each region to be headed by a Regional Vice-President, whose principal responsibilities include providing political leadership in his/her region, ensuring a high level of service delivery to members and assisting the locals in his/her region. He or she will also be the principal spokesperson for the Union in his/her region.
- C. The Regional Vice-President will be assisted in his/her duties by an Assistant Regional Vice-President who will replace the Regional Vice-President as necessary. Regional Vice-Presidents will be given the authority to make expenditures within an approved budget and responsibility for managing his/her office and for providing services in his/her region. He/she will be accountable for the management of the region.
- D. In each region, there will be a Regional Vice-President, an Assistant Regional Vice-President, and the current complement of URs and administrative staff. This will reduce the number of staff in each region by one (a total of eight person years).
- E. Regions should make more extensive use of the existing network of worker advocates and worker educators to take on some of the work currently done by full-time staff.

- F. The Regional Vice-President will assign dossiers (grievances, education, organizing, etc.) to regional staff as appropriate.
- G. The budget for each region should reflect the number of members in the region, and any special circumstances relating to the geography of the region. (i.e. regions are no longer “equal” from a budget perspective.)
- H. The permanent office of each region to be located within the region in a city to be approved by the National Executive Committee. In each region, satellite offices to be created as appropriate with the approval of the National Executive Committee.
- I. The Regional Executive Committee to be eliminated.
- J. Regional Vice-Presidents will sit on the new National Board of Directors, to help ensure regional input into the overall strategic direction of the Union, and to help hold National officers accountable for the accomplishment of their mandate.

13. THE SIZE AND SHAPE OF LOCALS

- A. Every local, and in particular the largest locals, should review its own size/structure with an eye to improving services to members. That review should include determining if any members would be better served by belonging to a separate local, or to another existing local, or by joining two locals together.
- B. The Regional Vice-President will determine the size and shape of locals in his/her region. The Regional Vice-President should examine whether there are any cases in which RSMCs would be better served by creating an RSMC local.
- C. Regional Vice-Presidents should pay special attention to the size/structure of locals of fewer than 25 members. He/she should encourage the sharing of resources as appropriate for small locals.
- D. The National Presidents meetings should be preceded by a one-day conference for presidents of small and isolated locals. Additional costs to be shared 50/50 by the local and the National Office.

D. SERVICING SPECIAL GROUPS OF MEMBERS

14. RURAL AND SUBURBAN MAIL CARRIERS (RSMC)

- A. Assign one NEC member the overall responsibility for RSMCs.
- B. Incorporate the RSMCs in the Urban Operations collective agreement at next round of collective bargaining.
- C. Organize a one-day RSMC caucus prior to the CUPW convention, for all RSMCs who are convention delegates.
- D. Give local Unions extra training, as necessary, to process RSMC grievances.
- E. Recommend that local Unions offer a (partial) mileage allowance for RSMCs who have to drive more than 25 km to attend local Union meetings.

15. TEMPORARY WORKERS

- A. Temporary workers should pay dues based on hours worked.
- B. The executive of each local Union should keep a list of temporary workers.
- C. Local executives should ensure that each new temporary worker has been met by a representative of the local within one month of being hired.

16. PRIVATE SECTOR BARGAINING UNITS (PSBU)

- A. Regional Vice-Presidents to have final authority on whether and when an organizing drive should be undertaken in their region.

- B. Regional Vice-Presidents to have responsibility to ensure that PSBUs are well serviced and well represented in Union affairs.
- C. Regional Vice-Presidents to make regular reports to the National Board of Directors on issues relating to PSBU organizing or servicing in his/her region.

17. GROUPS 3 AND 4

- A. Organize a one-day groups 3 and 4 caucus prior to convention or bargaining. Expenses for attendance to be shared 50/50 between local Union and National Office.
- B. Designate specific responsibility for liaison with groups 3 and 4 members to one Regional Vice-President.

18. RETIREES

- A. Locals should be encouraged to keep ongoing contact with retirees, and to facilitate the organization of retiree committees where possible.
- B. Retirees should be encouraged to continue to attend local Union meetings as observers.

E. INCLUSION AND EQUITY

19. WOMEN

- A. Reduce the frequency of national women's committee meetings to one per year, with teleconferencing between meetings as needed.
- B. Create regional women's committees in each region to meet once per year.

- C. As for all national committees, establish a budget for women’s equality. The National Secretary-Treasurer to publish an annual report on how the money was spent.

20. HUMAN RIGHTS

- A. Create a full-time, national human rights specialist position to report to the 2nd National Vice-President. The specialist would assist all four working groups of the national human rights committee, assist regions to pursue an equity agenda, as well as ensure an equity eye on all of the work of the organization.
- B. Reduce the frequency of national human rights committee meetings to one per year, with teleconferencing between meetings as needed.
- C. As for all other national committees, establish a budget for human rights. The National Secretary-Treasurer to publish an annual report on how the money was spent.

21. YOUTH

- A. Experiment with creating a Facebook or other social network approach to provide opportunities for young workers to network prior to regional and national conferences.

F. THE DEMOCRATIC FUNCTIONING OF THE UNION

22. THE SPECIAL NEEDS OF THE QUEBEC NATION

- A. The two current Quebec regions (Quebec and Montreal) should be combined into one region, with regional offices in Montreal and another in Quebec City.¹

¹ This recommendation is made on the basis of a newly constituted National Board of Directors, on which the Montreal local would be represented. We feel that whatever arrangement is finally agreed to, Quebec should have no fewer than three representatives on the highest policy making body. It might have several more.

- B. There should be one Regional Vice-President for the whole Quebec region responsible for providing political leadership to the region and ensuring the efficient administration and service delivery within a budget agreed to by the National Board of Directors. He/she should have the responsibility for making decisions on issues regarding Quebec. He/she has the responsibility for the administration of grievances, social issues, equity issues, and education within the merged Quebec region.
- C. The newly merged Quebec region should be managed as a whole from a service delivery point of view (for example education, grievances, organizing, etc.)

23. THE NATIONAL CONVENTION

- A. Reduce the size of the national convention by about one-third to approximately 450 delegates.
- B. The reduction to be effected in two elements:
 - i. No delegate to represent fewer than 50 members. Locals with fewer members than 50 will have to join together to field a delegate.
 - ii. One additional delegate per local to be authorized for every 150 members beyond the first 50.
- C. Organize one-day caucuses for specific groups on the day prior to convention. These could include RSMCs, PSBUs, and various “equity seeking groups”. The extra costs to be shared 50/50 between the national and the local Unions from which the delegates are attending.

24. GETTING AND KEEPING THE BEST STAFF WE CAN: ELECTION VERSUS PROFESSIONAL RECRUITING

- A. CUPW retain the general principle of electing many officers from the work floor for positions at national and regional levels.
- B. For four specific positions, which require a high degree of technical skill, create permanent specialist positions. These are:
 - i. One Organizing Specialist, to work under the direction of the National Vice-President responsible for organizing.
 - ii. One Human Rights Specialist, to work under the direction of the National Vice-President responsible for human rights.
 - iii. One Executive Assistant to the National President. (This position to be filled at the National President's discretion and on contract not to exceed the mandate of the current president.) The Executive Assistant to work on any issue as directed by the National President, including as appropriate, the national convention, international solidarity or relations with the trade union movement in Canada.)
 - iv. One Bilingual Specialist in Curriculum Development to work under the direction of the National Vice-President responsible for education.
- C. Eliminate six National Union Representatives positions at National Office (two in Grievance, one at NEC, one in Organizing, two in Education)
- D. Evaluate the utility of the National Union Representatives positions' assigned to Health and Safety and to Staffing, in the context of the review of the National Committees.
- E. All permanent staff to be recruited (where possible from among the CUPW membership) through a transparent, merit-based, hiring process, based on clearly stated criteria.

- F. Ensure that all new staff (whether elected or recruited) receive appropriate training within three months of taking up their new positions, and that opportunities for training upgrading are made available.
- G. A succession plan be developed to ensure the smooth replacement of staff due to retirement, promotions or quits.

25. CREATING A HEALTHY ATMOSPHERE WITHIN THE UNION: ADDRESSING HARASSMENT

- A. The NEC to review the impact of the recommendations of the Anti-Violence Sub-Committee within 12 months to determine whether further steps seem warranted.
- B. The NEC to develop a draft code of conduct for Union members, activists and officers, and suggest it be discussed at the local level.

G. CUPW AND THE OUTSIDE WORLD

26. LABOUR AND COMMUNITY OUTREACH

- A. Locals to have freedom to choose areas and methods of community involvement (including financial involvement using local funds), subject to approval of the Regional Vice-President.
- B. The Regional Vice-President to have the responsibility of giving guidance to local Unions in his/her region with respect to their role in local coalitions and labour bodies.

27. INTERNATIONAL SOLIDARITY

- A. Make CUPW involvement in international delegations more effective and transparent to members by:
- i. establishing clear, strategic objectives for delegations, linking international solidarity work with Union priorities;
 - ii. sending fewer people on delegations but offering more support in doing follow-up information and education sessions with members;
 - iii. developing an application process for delegations with clear selection criteria and follow-up requirements.
- B. Increase communications about all the international work of the Union, not just delegations.
- C. The NEC should increase transparency around the costs of International Solidarity by creating a budget for this item. **ALL** expenses incurred (travel, salaries, accommodation) to be attributed to the International Solidarity budget, and published by the National Secretary-Treasurer each year.

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