

**A JOB ANALYSIS OF TRADE UNION
AND
CIVIL SERVICE UNION SHOP STEWARDS**

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M. JILL SULLIVAN

**Submitted in partial fulfillment of the requirements for the
degree of Master of Science in Applied Psychology**

Saint Mary's University

Halifax, 1995



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ABSTRACT

Union literature on the activities of union stewards is sparse beyond the subject of the handling of grievances. The present study is a comprehensive examination of the role of the union steward. It examines the various duties, responsibilities, skills and qualities associated with the role the steward. In addition, it examines the views across the various segments of the union hierarchy; rank and file members, union stewards, and the Executive Members and Employee Relations Officers at the Union Head Office. Data from the subject matter experts was collected using Flanagan's (1954) critical incidents technique, questionnaires, focus group discussions, and interviews. Results supported previous findings that stewards' primary duties are listening to and addressing rank and file members concerns in the workplace, which are often precursors to the grievance procedure being activated. A job description of the union steward position is presented, developed from the data collected and from information contained in the NSGEU's steward's handbook. A consistent view on all related topics associated with the role of union steward was maintained across all groups of subject matter experts. Differences in the level of militancy expressed by Trade Union Act stewards and Civil Service stewards was not supported.

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TABLE OF CONTENTS

	PAGE
ABSTRACT	i
ACKNOWLEDGEMENTS	ii
INTRODUCTION	1
Historical overview of the origins of the shop steward	4
Role of the shop steward	6
Duties of the shop steward	8
Election and size of constituency	12
Impediments to the role of steward	14
Steward motivation	15
Introduction to the present study	17
Job analysis	18
Job analysis applications	19
METHOD	22
Setting	22
Participants	23
Procedure	24
RESULTS	28
Critical Incident data	28
Focus group and interview data	31
Duties and responsibilities of the steward	51
Qualities and skills possessed by a competent steward	53
Situations that impede stewards in the execution of their role	55
Areas in which stewards should expend additional time/effort	58
Steward motivation	59
Benefits of being a steward	60
Training needs / Education program	61
DISCUSSION	64
Critical Incidents	64
Duties and responsibilities of the steward	65
Qualities / Skills of a competent steward	67
Situations that impede steward in the execution of their role	68
Steward motivation	70
Benefits of the role of steward	72

TABLE OF CONTENTS

	PAGE
DISCUSSION (continued)	
Election & Recruitment of stewards	73
Training needs / steward education program	74
Job Description	75
Limitations of the study	79
Future Research Considerations	79
Conclusions	80
 REFERENCES	 82
 APPENDICES	

LIST OF TABLES

	PAGE
1. Demographics of subject matter experts	25
2. Frequency of critical incidents categorized by group and topic	29
3. Perceived duties and responsibilities of stewards	32
4. Perceived qualities and skills possessed by competent stewards	34
5. Situations which impede a steward's performance	36
6. Areas where members would like stewards to commit greater time/resources/effort	38
7. Perceived sources of motivation for stewards	39
8. Comments on training needs/steward education program	41
9. Focus group data on duties/responsibilities of the steward	43
10. Focus group data on skills/qualities a competent steward possesses	45
11. Focus group responses on situations that impede stewards from being effective	46
12. Perceived benefits of the steward role	47
13. Focus group comments on training/education program for stewards	49

LIST OF FIGURES

	PAGE
1. Job Description	76

LIST OF APPENDICES

- A. Civil Service steward demographic questionnaire**
- B. Trade Union steward demographic questionnaire**
- C. Member demographic questionnaire**
- D. Steward questionnaire**
- E. Member questionnaire**
- F. Behavioural examples handout**
- G. Effective incident sheet**
- H. Ineffective incident sheet**
- I. Open discussion questions for stewards**
- J. Open discussion question for members**
- K. Interview guide**
- L. Critical incidents generated by participants**

A job analysis of trade union and civil service union shop stewards

Relatively little research has focused on union activities and membership in Canada. This is surprising considering the extent of union affiliation. Between 1955 and 1990, Canadian union density rose from 33.7% to 36.2% (Thomason, 1994). Since such a large proportion of the workforce is associated with some type of union, one would expect that researchers would be interested with the extent of individuals involvement in union activities, the roles they occupy, the duties they perform, and their perceptions and attitudes. However, this has not been the case. Barling (1988) notes that in four of the leading journals pertinent to industrial/organizational psychology, union membership is virtually ignored. This is based on the content of articles throughout the years 1980-1986.

Gordon and Burt (1981) agree that industrial psychologists have not readily become involved in research dealing with unions. They attribute the neglect of the area to two reasons; distrust of industrial psychologists by labour leaders, and researchers pursuit of the course of least resistance. They contend that union leaders distrust industrial/organizational psychologists due to their association with groups that have been opposed to union activity. As well, I/O psychologists have historically aided management in solving human

resource problems (Gordon & Burt, 1981).

Secondly, Gordon and Burt (1981) assert that there has been little psychological research due to the fact that I/O psychologists have chosen the path of least resistance. Management demand for psychological research and services has been profuse, therefore, those seeking to provide such services have never felt the need to convince unions and/or union leaders of their value.

Integral to the area, and present in any union is the shop steward. If one considers the lack of union research in Canada, the research on the more specific leadership role of shop steward is virtually nonexistent. The two major studies in the area were published during the 1960's, and there has been little since. The majority of existing information deals with shop stewards in Britain. Nash (1977) reiterates that even in the United States, little information about shop stewards has been published since 1963. It is the purpose of this paper to investigate the role of the shop steward, and to qualitatively describe the stewards duties, responsibilities, and role as union representative.

Historically, the word "steward" comes from feudal times, when it represented the individual who managed a large household or estate. Their duties included the supervision of servants, the collection of rents, etc. In

England the term steward was used loosely in the coal mines to describe responsibilities (Nash, 1977). The term "shop steward" is not universal in its application; regardless of the term used, their function is generally viewed in a consistent manner across nations (Barling, Fullagar, and Kelloway, 1992). For the purpose of this paper, the terms "union steward" and "shop steward" will be used interchangeably. In the United States the role of union steward can be defined as follows:

- ° Union representative of a group of fellow workers who carries out union duties in the plant; e.g., handles grievances, collects dues. Elected by union members in the plant or appointed by higher union officials. (Nash, 1977, p.1)".

These are the duties that have generally been perceived to be performed in fulfilling the role of shop steward in the union. As Clark (1988) points out, very little academic research addresses duties of the steward other than grievance handling. The steward is perceived to be a supporter of the union, and his/her function would also include the encouragement of union support and participation in the rank and file. Kahn and Tannenbaum (1954) support the influential role of the union steward by stating that he/she can be instrumental in either promoting or weakening union democracy.

If the union steward does in fact play such a pivotal role in the

influence of the attitudes of the rank and file, it is useful to examine his or her role to a greater extent. Research on the Canadian shop steward is virtually nonexistent, and examination of the role of union steward in some depth has both academic and practical value.

Historical Overview of the Origins of the Shop Steward

The origins of the union steward can be traced to the "primitive" workshop organization; which were the beginnings of rank and file union leadership. In advent to the implementation of craft unions or the development of centralized organization on district or national levels, workers organized on a shop basis. Shop employees would elect a representative to take their issues and communicate them to the employer. As time progressed, union organization evolved from this simplistic form of communication as a result of several variables. Expanded productivity, the emergence of the manufacturer as the dominant economic force, and technological revolution all had a major impact on the evolution of union organization (Peck, 1963).

There are two examples that stand out in relation to the source of organization in the workplace. The first is the chapel organization in the printing industry. This likely holds the title for the oldest form of a recognized workshop committee. Skilled journeymen printers organized

themselves on a shop basis in an effort to control their conditions of work (Peck, 1963).

The second origin of workplace organization is in the mining industry via their pit committees. Such committees have retained their presence and status through the years and are recognized both by management and unions (Peck, 1963).

The majority of workshop organization did not occur until the onset of World War 1. In England, forms of workshop association were already in place, predominantly among skilled factory workers; in the form of piece-rate committees. Since payment was on a piece-work rate, such unofficial committees were formed in an attempt to represent worker concerns. These committees were not looked upon favourably by union leaders, who bitterly opposed their efforts. During this period, shop problems were widespread. Demands existed for increased productivity, compulsory enlistment for military service, and an increase in the cost of living. As well, dilution existed, which involved the substitution of a proportion of unskilled workers for skilled workers (Peck, 1963). All of these factors influenced a greater impetus towards official recognition of workshop organization.

"This spontaneous upheaval of the British working class over the firm resistance of employers, government officials, and trade union officers is referred to as the "shop steward movement" (Peck, 1963, p.26)."

The government was the first to react to the workers demands and granted recognition to the plant committee and departmental steward. The national trade unions did not reduce their opposition until shortly after the end of the war, at which time the shop steward system was incorporated as a component of trade union organization (Peck, 1963).

Role of the Shop Steward

The shop steward is the union representative in the "local" or division of the plant or organization. Historically, the workplace was an industrial plant, but in the present day and age includes a broad spectrum of workplace settings, from office environments, to hospitals, to schools and universities.

As defined by Labour Canada, the union steward is a:

- * Union member ordinarily elected to represent workers in a particular shop or department. His or her function may include collecting dues, soliciting for

new members, announcing meetings, receiving, investigating, and attempting the adjustment of grievances and education (Labour Canada, 1984,p.23)".

Peck (1963) identifies the shop steward as the rank and file union representative. The steward serves as the closest link between the individual member (non-officers) and the union. The steward has the function of being the closest link to the union in the workplace; thereby, the steward should reflect best the concerns of the people in his/her department. The steward must represent the workers both to management and to the union. Often this position may be difficult as the steward may tend to be the "man or woman in the middle" as he/she can be subject to three different social milieus: the union, the employer, and the departmental work group. A steward must express and defend actions not only to the union, but also to the people he/she works with, and to management. The steward is often the buffer between the union and its members on issues that involve grievances, union dues, political preferences, etc. (Nash, 1977). Therefore, the steward can be pressured from various conflicting areas when views are not shared. As an employee, the steward may be bound by certain rules which he/she may find unfair, as well as the policies outlined in the collective agreement (Nash, 1977).

Duties of the Shop Steward

What duties does the shop steward perform on a regular basis? How is the time spent per week allocated to these duties? The existing literature specifies that the main responsibility of the shop steward is the handling of grievances (Nash, 1977; Peck, 1963). It is estimated that a shop steward in the United States Steelworkers union spends 50% of his/her time on grievances; this rises to 75-80% for a steward in the International Union of Electrical Workers (Nash, 1977).

Clegg, Killick and Adams (1961) found that the most time consuming duty of the steward is negotiating with foremen and managers. Shop stewards rated negotiation, grievance handling, and discussions with union members to be the most important facets of their work (McCarthy, 1966). In fact, the only components that many shop stewards mentioned was negotiation with foremen and managers, and discussions with constituents. The conclusion was that in general, stewards spend most of their time talking, not writing (McCarthy, 1966).

In an examination of the Danish shop steward system, Lund (1963) asked workers, shop stewards, employers and supervisors an open-ended question in regard to the most important duties of the shop steward. Both workers (43%) and stewards (58%) mentioned wage questions to be the

foremost in importance. This was followed by contact between worker and employer which was the most frequent reply from employers and supervisors (Lund, 1963).

The importance given to contact between worker and employer is not surprising given the fact that it was stipulated in the collective agreement that governed these workers. However, information gained from the interviews indicated that the objectives of this task is viewed differently by management and workers. The workers view the communication as a means to achieve better wages, working conditions, etc., while management views healthy communication as a means of presenting their opinions, thereby preventing the workers forming untenable demands (Lund, 1963). Again, this reinforces the dual role of the shop steward, as both negotiator and mediator. The steward must present both the view of the workers to the employer, and vice-versa.

Overall, the main tasks performed by the shop steward in Lund's (1963) study were identified as: developing cooperation between workers and management, acting as a spokesperson for the workers, taking part in discussions on production matters, representing and communicating with the union and offering advice on personal problems.

Shuller and Robertson (1983) looked in depth at the contact between union member and shop steward and found that the majority of their time was

spent dealing with the individual's problems or with the quandaries of the immediate work group. This activity, on average, took 40 minutes of their time per week. In contrast, less than 5 minutes per week was spent in the discussion of union policy. The workers felt that it was the steward's role to take to management complaints that an individual worker would be afraid to express. Therefore, a large majority of the shop steward's time was spent handling individual's grievances with minimal discussion of union policies (Shuller & Robertson, 1983).

The shop steward also plays the role of administrator. As noted previously, union policies are rarely discussed, as stewards concentrate primarily on the administration, rather than the negotiation of agreements (Shuller & Robertson, 1983). Although many settlements with respect to wages and working conditions are outlined on a national level, the shop steward may be involved in the negotiation of local arrangements based on the national agreements. He or she may be responsible for the administration of these policies as well as the handling of grievances (Warr, 1981). Collective bargaining forms only a very minute part of the shop stewards activities (Kessler, 1986). The other two prominent duties were: dealing with individual grievances and disseminating information.

Dalton and Todor (1982) confirmed that stewards play an important

role in the grievance process procedure. The steward often acts as a mediator and the nature of the steward's intervention may have a tremendous impact on the resolution of the grievance.

Those who work on the shop floor and those in union staff positions may hold different perceptions of the steward's role (Batstone, Boraston & Frenkel, 1977). Fifty percent of staff cited the function of serving as a communication channel for the union member in contrast with 16% of the shop floor stewards. One hundred percent of the shop floor stewards cited protection of members, improvement of wages and working conditions, while only 31% of staff representatives believed this was a function of the shop steward role. Stewards were expected to promote socialism, trade union principles, to maintain unity and union organization, and to ensure harmony with management. Thirty-eight % of the sample of staff stewards cited this last duty versus 19% of the shop-floor stewards (Batstone et al., 1977). This suggests that there may be differences between trade and white collar stewards in their perceptions of their role and duties. Shop stewards may also be involved with political activities, collection of dues, community services, and educational work (Nash, 1977). The role and duties of the shop steward present a conflicting and ambiguous picture. The range of duties varies both across and within organizations (Barling et al., 1992).

Election and size of constituency

As defined previously, the shop steward is generally an elected representative of the union. The literature supports the notion that in the majority of situations, the steward may come into the position unopposed, or because no other individual desires the post. This is understandable when one considers that the role of shop steward is not the envy of others as he or she is often placed in a stressful position due to conflicting views from the various entities that one is in communication with.

McCarthy and Parker (1968) concluded that two-thirds of the shop stewards they studied were either the only candidate for the position or were granted their position in absence of any form of election. Rarely, were any shop stewards defeated in elections. Similarly, Shuller and Robertson (1983) found that 70% of their sample of 86 stewards entered the position unopposed. They note that a formal election is not the sole method of choosing a representative. There may be an individual that is the obvious choice or the selection may be achieved informally before the election date; thereby, resulting in the nomination of only one candidate.

Opposition to the appointment of a shop steward is often minimal. In fact, many stewards were unprepared to take on the position and had not sought the position. Moore (1980) examined one hundred shop stewards from

a wide range of occupations; 38% were reluctant to become stewards and an additional 31% had not actively sought the position. Several had previously refused to accept the position of union steward.

This lack of opposition, lack of formal approval, and reluctance to take on the role of steward may result in a shop steward's lower level of self confidence, and may affect dealings with both management and workers (Shuller & Robertson, 1983). The steward may feel more comfortable associating with union members whose union support is well-known, particularly in situations where the shop steward is required to promote branch or national union policy (Shuller & Robertson, 1983).

The amount of time a shop steward spends on union duties depends on the number of members that are represented. This may vary with the type of occupation. Clegg, et al. (1961) studied shop stewards in Britain who occupied a variety of occupations. These ranged from the printing industry to shipbuilding, to mining, to civil service. Although the white collar stewards in their study were excluded because of a small sample size ($n=12$); the average constituency consisted of approximately fifty members. Shuller and Robertson (1983) found that the average consistency of their stewards was 30 members. Kessler (1986) also found a wide variation in the size of steward constituencies, which ranged from six to one hundred and eighty-one.

Impediments to the role of steward

There appears to be a degree of apathy on the part of many workers to become involved or to take interest in, union activities. This is demonstrated by the reluctance of many to seek the shop steward position, and the minimal opposition they encounter in assuming office. Moore (1980) states several reasons for this situation.

To begin, the steward is paid by one party (the employer) and spends time representing another group (his/her constituency), which is unpaid. The work is voluntary, and holds dual status; high as trade union representative, and low as rank and file worker. Although an official of the union, the shop steward has little contact with the union. The shop stewards relationship with the union is poorly defined and is interpreted in many ways, at times controversial.

The final reason presented by Moore (1980) is that unlike the majority of volunteer workers, the shop steward does not garner any respect or sympathy from the general public. Nicholson, Ursell, and Blyton (1980) concluded that white collar shop stewards experience a lack of familiarity in the duties associated with the role, increasing role ambiguity. They also often feel the lack of support of the members of their constituency and perceive more conflict to exist among the workers. They have difficulty in resolving

industrial relations problems and, more often than not, consult with other stewards before making their own decisions. Although common attitudes existed between white and blue collar stewards, they differed in their attitudes toward militancy, union identification, rules orientation and apoliticism (Nicholson, et al., 1980).

Steward motivation

Given the characteristics of the shop steward position, what motivates or induces these representatives to hold office? Moore (1980) found that the most influential characteristic was that stewards strongly disliked the stress and disorganization that resulted from nonexistent or incompetent leadership on the shop floor. Motives such as the desire for power, the use of the position as a political basis, or promotion were not apparent (Moore, 1980). Stewards feel not only a sense of responsibility to oneself, but to others. As well, the stewards want some responsibility and a sense of control over matters that are of importance to them in the workplace.

The interest in the improvement of the workplace atmosphere dates back to the seminal research of Lund (1963) who found that the primary reason shop stewards accepted the position was their interest in seeing problems resolved. Other positive features of holding the position included

helping other workers; insight into the company and trade union work; recognition; and better seniority. Interestingly, 24% of shop stewards believed that there were no attractive features to the position. Shop stewards were more likely to have come from a family whose members were in trade unions and to have been a member of some type of association in their youth. They also had more contact and enjoyed communication with their fellow workers (Lund, 1963).

Batstone, et al. (1977) found differences in reasons for becoming a steward between shop floor stewards and staff stewards. Commitment to the trade union movement, the protection of the members, and the improvement of wages and conditions were the reasons given by the majority of shop floor stewards. In contrast, 82% of white collar stewards stated the need for someone to represent the members:

" The department is not union minded, but every department must have a steward. You've got to have a communications man to put the case, a link man. We had no nominations for steward. I didn't want to take it, but since I care about people having a fair say in day-to-day problems we couldn't afford to be without a steward. So I stood up and was voted in unanimously (Batstone et al., 1977, p.24)".

Both shop floor and staff stewards stated equally that the steward position provided personal interest or an opportunity to use their talents

(Batstone et al., 1977). This research, on the whole, supports attitudinal differences between shop floor and white collar union stewards.

Introduction to the present study

The need to examine the role of the shop steward in greater depth is apparent. Shop stewards occupy a key role, as decision-makers and leaders, and as facilitators of rank and file involvement (Nicholson et al., 1980). The position of union steward is not a rarity. Unionized environments are not uncommon in society; in Nova Scotia alone there are over 100 thousand unionized employees (Department of Labour, 1992). In each department, a union representative exists in the form of a shop steward. At one time, unionized organizations were predominantly blue-collar or trade workers. Today, white-collar unions are common. Warr (1981) reports 39% of all white-collar sectors are unionized.

The role of the shop steward is an ambiguous one, as discussed earlier. Steward's duties are not clearly defined and, as Moore (1980) asserts, the steward's relationship with the union is poorly defined and inconsistently interpreted. The individual that accepts the position of shop steward is often uninformed and unsure of the steward's duties. This role ambiguity may be a

cause of the lack in the number of individuals who seek the shop steward position.

Job Analysis

From the human resource or personnel psychology perspective, job component information gained from job analysis has applications which spill over into virtually all areas of human resource planning. In particular, the areas of personnel selection, training and development, and performance appraisal are all based on job analysis data.

Job analysis describes the important aspects of a job that set it apart from other jobs (Lent, 1989). Boydell (1970) defines it as a analytical study of a particular occupation. Job analysis breaks a job down into its components: duties, tasks, and responsibilities. It specifies the behaviours and incidents that occur. This information can determine the knowledge, skills, and abilities needed to perform the job (Levine, 1983). The job analysis is the first phase of job information and application in a greater human resource model. It is a means to an end, it assists in the provision of information to a litany of applications, and to the success in the consequent steps in the systematic approach to training.

Job Analysis Applications

The job analysis information is generally used to develop a job description. Other purposes include: job design and restructuring, performance appraisal, efficiency and safety, legal requirements, job classification, and job evaluation (Levine, 1983). Two other uses of job analysis information are worker training and personnel requirements and specifications. These have direct applications to the study at hand. A job analysis of the shop steward will clarify the duties, tasks, and responsibilities of the post. It will note both the positive and negative behaviours inherent in the position. This knowledge can prove valuable in the assessment of training needs. The union under study presently holds training programs for both shop stewards and members. Courses on stewardship and general membership are given. Half-day workshops are held pertaining to: occupational health and safety matters and collective bargaining, while week long courses are offered on leadership skills and political economy, as examples.

Presently, workshops are designed by management, based on their view of what is important. A job analysis of shop stewards will develop an overall descriptive profile. At present, expectations from management, union, rank and file, and the shop stewards may differ. Each may have a unique view of the role of the union steward position. The analysis will be useful in the

evaluation of and development of suitable, practical training workshops.

Shuller and Robertson (1983) found that training needs for stewards included: communication skills, the ability to explain how the union was organized, and the functions it performed.

The shop steward is an elected position, a job analysis will identify the knowledge, skills and abilities that are necessary to perform the job. This will allow the rank and file the opportunity to assess candidates for the position during elections. It could also result in candidates self selection, individuals might recognize that they are suited for to the position. People will also be more informed about the job when assuming the position; this should reduce role ambiguity. Martin and Berthiaume (1993) propose that training should focus on the role expectations of the stewards and on the clarification of their role. They endorse steward training as a means to enable the steward to better balance the conflicting demands of the position. The present study should help to clarify the steward's role by examining the specific components that comprise the job. It should help to reduce the role ambiguity that exists, as well as providing useful information on the role of the union steward in Canada, today. The present study is a comprehensive examination of the job related behaviours of the shop steward from several perspectives. Union Executives, the stewards, the rank and file may all have different views on the

steward's role. It is imperative to include information from each of these sources in a review of the steward position.

Method

Setting

The Nova Scotia Government Employees Union (NSGEU) is a relatively young union, having signed its first labour contract in 1969. It works to improve the rights of government employees; its current objectives are to promote the common interests of all members, to foster higher standards of service, to gain greater job protection, to gain free and full Collective Bargaining rights for all NSGEU members, and to provide a fair standard of living for NSGEU members. The NSGEU represents over 14,000 members province-wide and comprises 24 locals and 4 affiliated locals.

Approximately two-thirds of the members are represented under the Civil Service Bargaining Act and the remaining one-third under the Trade Union Act, as determined by their occupation. The primary difference between the two groups is that the members represented under the Trade Union Act have the right to strike.

The union steward is the official representative of the union in the workplace and is a key factor in the strength of the union. The steward plays a pivotal role in the workplace, having the means to promote understanding and interest in union activities. The steward is the primary contact with union

members in the workplace. The steward is elected or appointed by fellow members and/or by local presidents. Each steward can contact an Employee Relations Officer, a paid N.S.G.E.U. staff person at the Union Head Office for assistance with problems, grievances and questions. The degree of involvement of the steward in handling problems and grievances depends on the level of involvement of the steward's Employee Relations Officer (ERO). As well, stewards often approach Executive Committee Members for assistance.

Participants

Thirty-five stewards, rank and file members, Employee Relations Officers and Executive Committee Members at the Nova Scotia Government Employees Union served as subject matter experts (SME's) for the study. The sample contained 18 males and 17 females.

In terms of representation the sample was composed of 8 civil service stewards, 7 trade stewards, 8 civil service members, 4 trade members, 4 Employee Relations Officers, and 4 Executive Committee Members. The Executive representation consisted of the 1st Vice-President, 2nd Vice-President, 3rd Vice-President, and Secretary-Treasurer. The average age of the SME's was 41.20 years, ranging from 27 to 60 years of age. As shown in

Table 1, civil service stewards had served as a steward, on average, for 8.63 years, and trade stewards for 5.43 years. The vast majority of civil service stewards (87.5%) and trade stewards (85.7%) were the sole candidates for their steward position. All rank and file participants had completed the general membership course offered through the education program of the Nova Scotia Government Employees Union. The civil service members had belonged to the union, on average for 15.13 years, and the trade members for 3.50 years.

All participants were contacted by the Education Officer of the NSGEU. Upon their agreement to participate in the research, they received paid time off from their jobs. These costs were covered by the NSGEU, which is a standard practice for any research or training projects it sponsors.

Procedure

The job analysis research involved focus groups and individual interviews. All SME's were informed that their participation was voluntary and that all information gathered was anonymous and confidential. All were aware that the study would serve as the basis for a research thesis.

a) focus groups

Four focus groups were held over a period of 2 days. Morning

Table 1. Demographics of the subject matter experts

<u>Group</u>	<u>Sex</u>		<u>Age</u>	<u>Union</u> <u>Tenure</u>	<u>Position</u> <u>Tenure</u>
	M	F	<u>M.</u> <u>(S.D.)</u>	<u>M.</u> <u>(S.D.)</u>	<u>M.</u> <u>(S.D.)</u>
Civil service stewards	3	5	43.25 (9.24)	14.75 (6.94)	8.63 (5.21)
Trade stewards	5	2	40.29 (7.32)	5.71 (3.35)	5.43 (1.72)
Civil Service Members	2	6	40.75 (6.36)	15.13 (5.41)	N/A
Trade Members	2	2	30.00 (3.46)	3.50 (1.73)	N/A
ERO's & Executive	6	2	46.00 (7.96)	20.63 (9.24)	13.88 (8.46)

sessions were scheduled from 9-12pm, and afternoon sessions from 1-4pm.

All focus groups were held at the NSGEU Head Office. The first day consisted of representatives from the civil service sector, the stewards in the morning session and rank and file members in the afternoon. The second day the groups were composed of stewards and rank and file members from the Trade Union Act sector in the same order as the previous day.

To begin each session, the researcher and advisor introduced themselves to all present, explained the purpose of the research and obtained their informed consent. Each participant also introduced themselves and their place of employment.

Each focus group followed a similar format in the gathering of information. Participants completed the demographic questionnaire for civil service stewards (see Appendix A), for Trade Union Act stewards (see Appendix B) and for rank and file members of both sectors (see Appendix C).

Secondly, each group completed a set of written questions for stewards (see Appendix D) and for members (see Appendix E). Subject Matter Experts were asked to discuss the steward's duties and responsibilities, qualities and skills of an effective steward, barriers to a steward's effective performance, motivation for being a steward, and steward training needs. The written responses were then used to stimulate discussion on the various topics. A

coffee break followed the discussion period.

The next segment of the focus groups entailed the generation of specific behavioural examples using Flanagan's (1954) critical incident technique. A behavioural examples handout was provided for the participants reference (see Appendix F). The key characteristics of behavioural examples, as well as poorly written and well written samples were illustrated and explained.

Next, participants generated examples of particularly effective performance of union stewards, followed by ineffective examples or sheets that were provided (see Appendices G and H). The stewards and members were asked to chronicle as many examples as they could recall.

The focus group sessions concluded with a second open discussion on issues relevant to stewards along with discussion on how to encourage others to become stewards, and the benefits associated with the stewards role (see Appendix I). The rank and file members' open discussion questions also asked about their relationship to their steward (see Appendix J). All discussion sessions were tape-recorded with participants permission to aid in obtaining accurate and concise information. All participants were thanked for their participation.

b) interviews

Eight individual interviews were arranged with four Employee

Relations Officers and four members of the Nova Scotia Government Employees Union Executive. The interviews were conducted on the three days following the focus group sessions. Interviews were up to one and a half hours long and were conducted at the NSGEU Head Office.

To begin, participants completed the same demographic questionnaire given to stewards. The interviews were structured and followed a protocol based on the questions posed in the focus groups (see Appendix K). Executive Members and ERO's generated critical incidents, orally. In addition, they were asked to comment on the current steward program and the steward's role in relation the Employee Relations Officer's work. All interviews were recorded on tape with participants permission. Participants were thanked for their time and participation.

Results

Critical Incident Data

A total of 51 critical incidents were generated by the four focus groups and 13 additional examples were produced by the Employee Relations Officers (ERO's) and Executive Members. These incidents are presented in Table 2. A fairly consistent theme emerges across the examples given by the members,

Table 2. Frequency of critical incidents categorized by group and topic

<u>Trade Union Members</u>	<u># incidents</u>
<u>examples of effective incidents</u>	
collective agreement/contract interpretation	3
orientation of new members	1
grievance handling	1
<u>examples of ineffective incidents</u>	
collective agreement issues	1
grievance handling	1
<hr/>	
<u>Civil Service Members</u>	
<u>examples of effective incidents</u>	
collective agreement issues	2
member orientation/education/involvement	2
grievance handling	1
<u>examples of ineffective incidents</u>	
N/A	0
<hr/>	
<u>Trade Union Stewards</u>	
<u>examples of effective incidents</u>	
enforcement of collective agreement	6
grievance handling	5
<u>examples of ineffective incidents</u>	
enforcement of collective agreement	1
grievance handling	4
<hr/>	
<u>Civil Service Stewards</u>	
<u>examples of effective incidents</u>	
grievance handling	12
job reclassification	2
collective agreement issues	4
<u>examples of ineffective incidents</u>	
grievance handling	2
collective agreement issues	2
job reclassification	1
<hr/>	
<u>Executive Members & ERO's</u>	
<u>examples of effective incidents</u>	
collective agreement issues	6
grievance handling	3
<u>examples of ineffective incidents</u>	
collective agreement issues	2
grievance handling	2

stewards and executive officers. The majority of incidents deal with collective agreement issues and grievance handling. Both civil service and trade union members identify incidents concerning collective agreement issues, grievance handling and the orientation of new members.

Trade union stewards identify incidents regarding grievance handling and the enforcement of the collective agreements. Civil service stewards cited both these types of incidents but also added incidents involving job reclassification. The Union Executive Members and ERO's cited only incidents dealing with grievance handling and collective agreement issues. All of the critical incidents generated by members and stewards are presented in Appendix L. All examples could be sorted into four categories: collective agreement/contract interpretation, member orientation, grievance handling and job classification. Examples representing each category follow:

collective agreement: the required 4 weeks notice was not given for a shift change. The steward approached the manager with the breach of contract which resulted in the implementation date being changed to allow the required notice.

grievance handling: a casual worker was given hours before an employee with higher seniority. The steward helped the employee write the grievance, submit it at the appropriate time, and the individual won the grievance.

member orientation/education/involvement: members in the workplace were not attending local meetings, union courses or other union activities. The steward kept the members informed and continuously encouraged participation. This resulted in several members increased participation, some very actively while others sporadically. However, an overall increase in the level of union participation occurred.

job reclassification: a group of secretaries had been promised a reclassification by the civil service commission. Little action had occurred on the matter so the steward was contacted. The steward got involved, explained the process, and supported them throughout. The secretaries received their reclassification as well as back pay.

Focus Group and Interview Data

The questionnaires, focus group discussions and interviews on the steward's role produced consistent information. Due to the extensive database that was amassed, the results are organized and discussed according to topic, rather than the research tool used to obtain the data. However, for source identification purposes results are also presented in tabular form. Tables 3-8 present data obtained from questionnaires and interviews. Tables 9-11, and 13 present focus group discussion data, and Table 12 presents focus group discussion and interview data.

Table 3. Perceived Duties and Responsibilities of Stewards**Trade Members**

- representation of members at work, at local union meetings and to management
- collective agreement interpretation
- grievance handling
- communication channel between union and member
- to promote union involvement of members

Civil Service Members

- communication link to members
- to inform members of union rules and employee rights
- information source and resource person
- represent members at meetings with management
- to listen to members concerns and attend union meetings
- source of support in conflicts with management
- primary contact re: problems/concerns
- contract interpretation/negotiation/enforcement
- to make themselves known and available to members

Trade Stewards

- collective agreement enforcement/contract interpretation
- represent members concerns/grievances
- represent members in disputes with management
- liaison between member and NSGEU
- scrutinize management
- self-education to competently handle duties
- to be responsive to members, to be exact and complete in handling grievances

Civil Service Stewards

- assist employees with contract problems
 - assess/investigate/follow-up problems/grievances
 - to represent the union in the workplace
 - funnel information to/from ERO's and local
 - an effective liaison with members
 - maintain a stable work environment
 - contract interpretation, file grievances
 - to advocate on behalf of the membership; listen to their concerns, know the contract
 - to defend the rights of the members
- (table continues)

Table 3. Perceived Duties and Responsibilities of Stewards

Civil Service Stewards (continued)

- ensure the contract is not violated
- information source for members
- mediate in non-contractual difficulties; provide insight
- attend local meetings

Executive Members and ERO's

- to take the concerns, violations of contract from the member to the first level of grievance
- to make themselves known to member; create the presence of the union
- to deal with grievances
- a counsellor
- to assist in collecting information on a grievance/concern/complaint
- to post notices within the workplace, keep members informed
- to handle the problems of the workplace
- a contact person
- to be the voice, contact, ambassador of the union
- to protect the integrity of the collective agreement
- to introduce new members to the role and functions of the union and to encourage them to become active participants

Source: questionnaire and interviews (Executive Members and ERO's)

Table 4. Perceived qualities and skills possessed by competent stewards**Trade Members**

- strong-willed, tactful, responsible, trustworthy
- approachable
- respected by fellow union members
- good listener, good communication skills
- available to all employees
- a motivator
- strong leadership abilities
- good memory, good writer, good speaker
- someone who can talk to people and cares
- able to stand up for what is right

Civil Service Members

- knowledge of union laws and rules
- able to be a good sounding board
- able to get to the bottom of things quickly
- know the contract
- a people person
- well-informed, good listener, good speaker, dependable, trustworthy
- respected by others; above reproach
- approachable, objective
- caring; a good communicator; non-confrontational
- understands the contract, union legislation, structure of the union
- successful/competent in his/her job
- a leader, assertive, sense of fairness

Trade Union Stewards

- good listening, communication, presentation and writing skills
 - good understanding of the union movement (philosophy, history)
 - good understanding of the collective agreement and the grievance process
 - objectivity; diplomacy; ability to grasp the real situation
 - leadership; tenacity; dedication; people skills; common sense
 - sound knowledge of the contract
 - perceived as accessible to members
 - good rapport with management
 - able to be fair and recognize personalities and traits
 - self-confidence, motivated, able to face management
- (table continues)

Table 4. Perceived qualities and skills possessed by competent stewards

-
- genuine concern for the well-being of others
 - firm belief in the labour movement

Civil Service Stewards

- good listening skills, good judgement
- knowledge of the collective agreement
- ability to listen, analyze and remain calm
- able to persevere, contact ERO's
- personable, nosy, assertive
- communicator, facilitator, referee
- know where to go for assistance
- leadership, self-confidence, assertiveness, fairness, kindness, compassion, truthful
- able to interpret contract effectively
- alert to situations in the workplace
- able to keep confidences
- ability to remain calm during stressful situations
- educated; bold; able to deal with people
- intelligent, sincere, good mediation skills
- fearless in the face of intimidation

Executive Members and ERO's

- ability to deal just with the issue, objectivity; able to look at both sides of an issue
 - calm, level-headed, a mediator
 - personable, polite yet straightforward
 - have the trust of the members; confidentiality
 - must believe in the cause of the union
 - the ability to decide whether or not someone is telling the truth, know the difference between fact and fiction
 - does not take sides; consistent; up to date on collective agreements
 - rational, reasoning skills, able to listen, put yourself in their shoes
 - able to tell a member when they do not have a grievance, but will check with others just to be sure
 - dedication, stamina, able to stand up to the employer
 - a people person, clear thinker, not easily intimidated
 - must have the confidence of the members
 - communication skills, listening skills, organizational skills, public speaking skills
 - ability to compromise
 - honest, self-assured, confident
-

Source: questionnaires and interviews

Table 5. Situations which impede a steward's performance**Trade Members**

- caseload from his/her other job(s)
- availability at the workplace
- time restraints; work situations make it difficult for steward to leave assigned work area and meet with other members regarding problems
- steward represents a large number of people, many under different managements
- indifference to belonging to a union, negative attitudes towards unions by fellow employees
- lack of trust in steward; outspoken about other problems of no concern

Civil Service Members

- our workplace tends to isolate us from other employees during the workday
- none; other than lack of interest on his part
- shift work; taking on too many other roles

Trade Stewards

- geographical area, poor contract, intimidated employees, low morale
- the unwillingness of management to deal with the truth
- the time involved to act on a situation and work through to resolution
- lack of time on jobsite to perform duties
- knowledge required is forgotten after years following steward education process
- today's economy, management, lack of employee's interest in job security
- poor wording of contract clauses
- unrealistic expectations from uninformed union membership
- weak or false information from membership when representing them in a dispute
- lack of knowledge by the employer/supervisor of the collective agreement
- unwillingness of member to pursue violations of the collective agreement
- union member's fear of management reprisals in contract violations and other workplace issues
- sufficient time between work duties and union duties
- ensuring all stewards obtain sufficient training and this assume full responsibilities for their role as steward
- assigning stewards specific duties aside from traditional steward roles
- anti-union bias from management
- lack of support from rank and file for anyone else's problems but their own
- representing a group or department in our organization that I have little knowledge about
- not being able to use the telephone service at work, cost of calling members long distance
- the fact that members are spread throughout the entire county

(table continues)

Table 5. Situations which impede a steward's performance**Civil Service Stewards**

- difficulty in getting time off work for union business, organizational requirements
- apathy of coworkers
- coworkers are uninformed about the contract
- informed coworkers not willing to "make waves", still willing to do things management's way
- members have a low or negative attitude towards the union, do not have faith in the union's ability to help them
- lack of knowledge of other stewards; lack of confidence and inability to attend all levels of the steward's program
- poor management practices
- I have management support, work and time is self-directed so not experiencing difficulties, change or crackdown in management could change this
- employee-employer contract interpretation
- time available for investigating problems: busy schedule, expected to be at my desk
- job stress; coworkers uninformed, unwilling to stand up for their rights as defined in collective agreement even when informed of those rights
- my supervisor is a union member, I find this a conflict
- management's ability to block you're leaving the workplace to take care of situations when necessary
- people learn of your ability and all want attention at once
- cliquish groups that attempt to undermine your efforts
- two-faced managers
- public service makes it hard for members to approach me
- coworkers do not inform steward of actions that take place that are contrary to contract

Executive Members and ERO's

- in many cases the supervisor of employer is anti-union to begin with
- environment in the workplace
- people that make it difficult, in some cases people may be intimidated by mgt.
- in most cases, stewards are targeted, looked upon as troublemakers
- may be close to the person involved; or be biased towards that person
- may be situations where the steward does not feel competent to handle the situation
- areas where confidential; harassment; sick leave; medical confidentiality
- need stronger contract language to allow them time to deal with the issues
- difficult supervisor; some work areas supervisors allow them the time to deal with issues, others do not
- roadblock everytime you turn around, can't get time off, no flexibility
- the narrowmindedness of some stewards; they've already made up their minds
- complete acceptance in this union that members should be calling head office directly
- stewards are not always informed of a problem
- harassment from employer; intimidation; veiled threats, being given dirty jobs
- their biggest problem is being able to leave their workstation or work area to conduct grievances or investigations. Employers handcuff their access to the employees

Source: questionnaire and interviews

Table 6. Areas where members would like stewards to commit greater time/resources/effort

Trade Members

- the move by most governments to privatize essential services
- disseminating information to the union membership
- I feel the steward does an excellent job; however I am not sure if this is the feeling throughout the entire workplace
- training new members when they first become members; a basic understanding of where the union dues are going and how it works
- when to go to a steward? knowing what we can or can't do as a member; our responsibilities

Civil Service Members

- finances; address how union spends dollars
- contract negotiation
- all areas; individual doesn't even attend local meetings
- we have a situation where employees have avoided the steward; steward should work at educating those at our workplace re: his duties and responsibilities
- steward is unavailable, when steward is approached usually has fast answer to put you off
- steward never gets back to you re: your concerns
- steward does not seem to have much knowledge, never has the answer
- assessing safety at the workplace
- reduction of staff
- be more visible
- getting more information correctly across and to make sure staff sees union people are working hard for them
- getting union information across to fellow employees

Executive Members and ERO's

- more time and effort spent introducing new members to the workplace
- up to the steward in the workplace to get or keep the momentum going, get other people involved in the union
- when they go to a steward's course they can go back to the workplace and tell people what they've learned, encourage involvement

Source: questionnaire and interviews

Table 7. Perceived sources of motivation for stewards**Trade Members**

- believer in the union and what it represents
- ability to demonstrate leadership better than others
- positive attitude/self-esteem
- a motivator
- someone who enjoys people and representing their problems
- striving for a better, more fair and consistent workplace
- wants to protect union members rights under the collective agreement
- someone who cares about their job and wants to be able to have a say in how things are done
- a person might think they can do a better job than the incumbent
- for knowledge
- for protection for himself and his fellow brothers in their workplace

Civil Service Members

- to know more about the union
- to be helpful to their fellow employees
- no information from union reps getting to staff
- interest in union affairs
- dissatisfaction with present steward and thinks he/she can do a better job
- a desire to be of service to fellow member; to be more involved in the union
- a desire to learn more about how a union works
- concerns re: the workplace and feeling one would be able to make a difference or at least fill the role
- to be helpful and to try to make positive changes in the workplace and union
- my steward took the position to get time off work for courses and after the first few were completed lost interest and stopped representing the members
- there are staff that do have problems, to be there for support
- see that people are being treated fairly
- an awareness of the possibilities of not being treated fairly by management

Trade Stewards

- consistent and obvious abuse of my fellow workers
- policies and procedures which are directed at putting labour back into the dark ages
- to bring fairness and equality throughout the employee group
- when you see your coworkers being taken advantage of
- knowing that you were able to help someone
- keen interest to see that collective agreement is being followed by management
- helping people who can't help themselves
- a natural dislike for injustice in the workplace
- I don't like people making decisions for me without knowing what I want
- social justice; ensure fairness and equality in the workplace

(table continues)

Table 7. Perceived sources of motivation for stewards**Civil Stewards**

- tired of being screwed by management who would have you believe that whatever they say is the truth and should be believed
- to help others work in a fair and equal environment
- desire to change/improve work conditions and an arrogant sense that I can speak well for my members
- what you can do to help others, will also benefit yourself
- injustice; I hate injustice
- fairness
- I want to know what is happening in my workplace, want to know I'm being treated fairly and want fair treatment practised to all
- I believe in fighting for our rights, without a union we would be modern day slaves

Executive Members and ERO's

- seeing unfair actions, instead of sitting back and complaining, doing something about it
- if you do something to help the situations, you become healthier, the union becomes healthier and everybody benefits from it
- union involvement, involved with their fellow workers
- person that wants to see injustices corrected
- get involved by filing a grievance, positive outcome, spurs involvement
- usually people won't get involved until there's a problem and then they find out what the union can do for them
- others come from a position where there was a union, so when they join the civil service they want to get involved in the union
- dissatisfaction in the workplace; somebody's got to do it
- just to get the weekends in Halifax, not necessarily a large number of people
- personal push from within, see the inequities going on around them
- desire to do the right thing is what keeps people in it for the long run
- those on a power trip usually do not last long

Source: questionnaires and interviews

Table 8. Comments on training needs / steward education program**Trade Stewards**

- mandatory progression with time limits
- some type of performance appraisal with individual program development plans
- more training before you become a steward, should have to take the courses before you actively start the job
- more contract interpretation seminars
- more communication and leadership courses (not just weeklong but one day things)
- stewards should be on as many committees as possible so they can see other active members at work and draw on the positive atmospheres, to make the general membership aware of why the union needs strong willed people to keep the fight ongoing
- yearly "refresher" for people who have completed Level 3
- semi-annual contract interpretation education sessions with stewards and ERO's
- study their own contract; steward courses; communication; leadership
- counselling course almost a necessity
- leadership
- increased quantity and quality of workshops with concentration and serious role playing - enabling the individual to apply the knowledge accumulated in the proper way at the proper time while created in a controlled manner to management pressure

Civil Service Stewards

- labour law (basics)
- more workshops on understanding contract language
- basic management skills so that we may better understand where they are coming from
- insist on leadership/communication
- mediation abilities; updating in skills on a yearly basis
- more hands on training in arbitrations
- more confidence building seminars by union head office
- communication and people skills
- the workshops dealing with contract interpretation have been the most useful
- steward-manager conflicts/personalities
- teach a steward about being more "professional", how to handle their stewardship and not use it as a power trip
- some training on doing group work; running a group and how a group of coworkers can act as support to one another
- stress management

Executive Members & ERO's

- training offered is excellent
 - I don't know that the civil service stewards are taking their excellent training and using it
 - there are no areas that are not being addressed in the training workshops
- (table continues)

Table 8. Comments on training needs / steward education program

- refresher course should only be given to those stewards that are active, because that is money well spent
- all in all the workshops are working very well; structured, also bring in other people with expertise in health and safety
- I'm not aware of what's in the workshops, it's been a while since I took them
- re: arbitration; cost involved, generally pass the information along step 2 & 3 to the steward involved; as well as a summary to chief stewards
- after a person has gone through all the levels, what we've been doing is having a general steward's workshop 2 years after they've finished all the levels, this brings people up to date
- it's the same program for excellent stewards as for the lousy stewards, therefore the content is not a problem
- nothing missing; maybe a graduated steward program, put the knowledge to use before advancing to another level; however, this is said with reservation
- stewards seem to enjoy the courses, the socializing, the content, listening to what others have to say
- shop steward training for ERO's would be good; would have no expectations of what stewards should be doing if you had not come up through the ranks; although all of the present day staff did have involvement in the union before assuming ERO position
- many take the training and sit on it, they have never processed a grievance, dealt with management on any of the concerns that employees have had.
- re: refresher course, valid suggestion, if it was one of my stewards I could get together with them one on one for a couple of hours and go over things
- generally the different aspects that they cover are useful, the program is there, the difficulty is making them act as stewards
- some people do not even want the ERO's opinion, they want a legal opinion
- it's excellent, it's second to none, Norm does an excellent job
- the levels are graduated in such a way that the information finds it's way home perfectly, you're not overwhelmed at the first level, and not overwhelmed at the 2nd level, they're built perfectly
- we may need to add some things because of the issues happening in the workplace, may have to deal with things like layoffs in the workplace; people having their positions declared redundant
- re: refresher course; certainly a good idea, may not be applicable to everybody
- the steward workshops are the best I've seen, I've been involved in a number of unions
- it takes a long time to get a person to where they are comfortable in the role of steward, maybe we should expose them to more situations, more arbitrations (chief stewards), show them how to prepare for arbitration (cut down on legal costs)
- have to demystify the process, give them more knowledge (arbitration)

Source: questionnaires and interviews

Table 9. Focus group data on duties/responsibilities of the steward**Trade Members**

- go between the employee relations officer and the member
- represent the local at union meetings
- all other responses word for word from questionnaire

Civil Service Members

- I'm very uneducated when it comes to stewards, I believe the steward should be there to become involved with the concerns of employees. That's what I believe but not what I've experienced on the job
- to listen to the union members concerns and complaints, to motivate other members to be active in the union
- to keep other members informed of union happenings
- to tell the members their rights
- a resource person, a stepping stone, a person to go to when you have questions about sick time, contract interpretation
- any information she gets, she puts up on the bulletin board

Trade Stewards

- to represent the worker in the workplace, key person to the membership re: collective agreement
- to be responsive to members in your area, location; be accurate and complete in handling their problems and concerns
- involved in continuous scrutiny of management
- obligated to educate oneself to a level to handle the commitment you've made
- the liaison between the workers I represent and the ERO
- responsible for interpreting the contract as best I can, and then I am the connection to the ERO. I see myself assisting in the grievance procedure not performing it
- I think the duties and responsibilities of the steward are really a reflection of the local itself, in the last 8 years that I've been active as a steward, there have been 3 grievances; how can you be good at something if you don't have the experience. It is a very inactive local. They don't want to file grievances
- counsellor
- each steward is a big part of communications; they are responsible for getting information to every workplace in their area

Civil Service Stewards

- to make sure that the collective agreement is not being violated
 - to represent the union in the workplace
 - to be the funnel between the membership and the union
- (table continues)

Table 9. Focus groups data on duties/responsibilities of the steward**Civil Service Stewards (continued)**

- contract interpretation, you get alot of people stopping by to find out what it means, that sort of thing
- standing up for the rights of the members, if the contract is being violated
- leadership
- once people find out you're a steward they come to you with the least little problem
- you become a counsellor, work-related problems that have nothing to do with the contract or union
- have to watch for people making deals with management
- sometimes they call you to find out how to get around the contract, to get the o.k. from you, and how much trouble they will get in if they do it
- I get alot of people coming to me with personal problems

Source: focus group discussions

Table 10. Focus group data on skills/qualities a competent steward possesses

Trade Members

- good writer, good leadership ability
- good motivator, most people are indifferent, so if they can get them interested in the union, get them involved
- tactful

Civil Service Members

- need someone outspoken, that is not going to back down
- confidentiality and a moral person
- I'm totally baffled, I don't know what a steward does
- I think people only get involved and find out who people are

Trade Stewards

- respect of their members, very hard for members to come up to them and tell them their problems if they don't have that respect.
- can communicate, and common sense
- knowledge of their contract
- good communicator
- self confidence, motivated
- response is very important, you do as much for the person in another workplace as you do for the person sitting next to you
- always be responsive

Civil Service Stewards

- listening skills, communication skills
- I see people with communication skills but if they don't have the self confidence it is a waste of time
- assertiveness/aggressiveness
- fearless in the face of intimidation
- have to know the games because they play a lot of games (management), one minute they're your best friend, the next minute there's a memo contradicting everything they just said to you

Source: focus group discussions

Table 11. Focus group responses on situations that impede stewards from being effective

Trade Members

- indifference to the union and negative attitudes
- I can't think of anything the employer does to make it difficult
- because of work situation my steward is in an enclosed area, so is not in contact with alot of people, there may be problems brewing but because of distance may not hear about them or get the whole story
- a good knowledge of the union and the purpose of the union

Trade Stewards

- most of our stewards are in locations where they are alone, some of our steward do not want to make waves because they are there alone, and they have administrators, supervisors around them all the time, the intimidation can get to you
- we have over 100 workplaces in the county that we're responsible for, some only have one member, the steward might be responsible for 20-25 of those workplaces
- always running a little bit faster to keep up; when we joined there was a meeting where the stewards names were put in large letters on a blackboard as the ones to target. It's awfully hard to get a promotion. People are aware of that and are not apt to make any type of controversy with the employer until it really hits them hard
- there are staff in the workplace that if you wrote up a job description for them it would be "union buster"
- in our workplace the steward gets more respect, they look at you and say this person has strengths and assets and look at you with respect. In fact, if you want protection you become a steward in our local
- you are labelled as "the union guy"

Civil Service Stewards

- coworkers are not informed, or if they are informed they're not willing to make waves; even if you go to them and point out a contract violation, it won't even get to a grievance where they sign something because they're not willing to push it; people are scared
- management and supervisors that think just because it comes out of their mouth it's gospel, people that try to intimidate
- conflict because my supervisor is a union member as well, wanted me to use overtime for coming here today, she does my performance evaluations, denies me pay increments
- members who do not file grievances

Source: focus group discussions

Table 12. Perceived benefits of the steward role**Trade Members**

- you know more about what's going on from attending union meetings
- you are in closer contact with the president so you get information, and talk to other shop stewards
- satisfying in itself, making it a better, fairer workplace

Trade Stewards

- it's being able to help people who can't help themselves
- more of a counsellor than anything, and that makes me feel good
- self satisfaction from not being walked on
- I have the respect of my employer, they'll call me for my interpretation of the contract
- I appreciate the learning process, the education that I can give, more aware of what your rights are, a social justice type of thing
- respect of the support services, the management people would rather shoot me than see me
- you don't get involved in this for selfish reasons because if you do it's the wrong place to be
- the initial reason was that if I'm paying dues, I'm going to know where they're going, and after that people were so uninvolved. People appreciate the fact that you're involved to help them, that you're serious you're not afraid of management
- respect from your members
- gives you the opportunity to see that the glass is not only half empty but half full
- you get to communicate with others like today, to see that it's not only gloom and doom, to give you a boost
- just the ideas of coming to this session today brought a whole lot of other ideas to mind, got a lot of communication within our own group, how they handle things and it was positive

Civil Stewards

- self satisfaction
- got involved because I was tired of being lied to and I wanted to find out myself what my rights were
- self interest

Executive Members and ERO's

- to see that coworkers are being treated fairly within the contract
- the knowledge that you learn of your own contract
- become a leader where others look to you for advice
- become more involved
- I don't think there are benefits
- it is great training but you take a lot of flak when you're in the position
- I don't know that there are any benefits

(table continues)

Table 12. Perceived benefits of the steward role**Executive Members and ERO's**

- personal satisfaction when they resolve a situation
- gives them the feeling of a little bit of power within the workplace
- "if I've got there's no one who can express that problem better than I can myself", that's what got me involved
- acquired training
- people that are really involved get alot of personal satisfaction
- my membership is 90% female, they've felt the need to do something for a long time; men moreso like to prove a point, whereas women just want the situation to be remedied
- possibility of career change, advancement
- self satisfaction, knowledge, well informed, know what's expected of me, what's involved
- opens a door, education, world of opportunity as far as what one can learn, advancement
- can get out of it what you put into it, you learn about your employer, the law, endless possibilities
- an entry level to the union

Source: focus group discussion and interviews (Executive & ERO's)

Table 13. Focus group comments on training/education program for stewards**Trade Stewards**

- there's no follow up after level 3, unless you are in a very active local where there is a lot of grievances, you need a refresher course of some type
- I agree, there should be an annual refresher course/workshop, where you see the person still has potential (i.e. but does not file grievances because of intimidation). I would like to see in these workshops more role-playing and insistence that these people get involved
- within the local a semi-annual contract interpretation education session, where the ERO comes out and sits down with the active people and stewards, throws out situations that we have to look at the contract and see if it's a grievance or not.
- the one flaw in the whole results from the workshops was that there's still an inability of people to react to management. The area is not serious enough. When you're in the role playing and you convince the steward that this is a serious situation and that he better act accordingly then you'll get the necessary response.
- after workshops I've seen both extremes happen in the action of stewards; some go back and do not react when intimidated by management whereas others overreact
- there should be something instituted into the workshops so that people essentially will react automatically, as they should.
- maybe a chief steward workshop, so that you can teach them the correct reaction, since they look to you for advice, guidance
- if they are going to preach restraint then at the very least have a chief steward workshop which will prepare you to put on a inlocal workshop as a refresher situation. Give them (chief stewards) not only the information but the tools to do it
- week long workshops in Antigonish I strongly recommend for stewards, but one thing they don't have is a weeklong course for stewards, they cram everything into 2 days. The weeklong political economy course for example
- would like to see workshops with case histories that deal with everyday issues, possible send out a survey to see what are the most common problems that stewards have to deal with, whether it's sick leave abuse or whatever and have some case histories available to discussion and some reasoning as to why it went this way or that way, i.e. due to geographical location or different labour laws in the province, the whole works. It's surprising when you go to arbitration how often case history comes up. Personally, I would like to be more educated on this stuff

Civil Stewards

- do not help confidence (consensus)
- workshops are informative, get good practice, you learn from them but they do not help you understand what you're up against
- need to deal more with role playing and situational examples
- most things come up as surprises and are more difficult to deal with than if you're prepared
- in the role playing; show the right way and possibly the wrong way to handle the situation.

(table continues)

Table 13. Focus group comments on training/education program for stewards

- Although we changed roles ie. employer, steward, employee, we didn't know which situation was right and it was hard to tell which was the best way
- you also have all the people that are beginning stewards, none of them know the role they're playing; of manager, they're not familiar with grievances, so you've got a role play situation where they don't have the experience of what they're doing
- have experienced stewards come in and act as management so they know the kind of presentation that one would deal with, as opposed to novices who have no experience
- in alot of stewards, they are stewards because they've applied to be stewards, they don't have any skill as such, they just think they'd like to do it, or someone has coerced them. I think what we as active stewards have to do is screen people, so that they realize there's a job involved, one that needs to be done relatively well
- have to address the issue of confidentiality at workshops, it's mentioned but not stressed. People don't seem to realize the importance of confidentiality, or the lack of and people can't seem to put themselves in the position of the griever. They don't see their position as one of trust and if they violate that people won't come to them with problems
- I feel that after a chief steward has finished the level 3/level 4 there should be another level that is similar or close to what an ERO does because I think that all chief stewards should have the ability to deal with grievances right up to level 3. If we do that we will find that stewards are more confident, especially stewards in areas that don't have a lot of grievances, don't get exposure to writing grievances, they tend to get stagnant. A course that gives a bit more and better understanding of the grievance process.
- I think there should be refresher, it's probably been five years since I took the level 3, a refresher to remind us of what we're out there for
- if you don't file grievances, you lose that ability, how to find the clauses and how to file and write up that grievance. If we do that (course) it gives us a bit more confidence
- there should be a way to communicate with stewards more often between the union and the steward. Let us know where the union is going, ie. travel allowance, those are the nuts and bolts types of things that people want to know about
- the steward program is good for receiving information but the practicality in the long run is not working out because you're not getting enough people involved in the process
- I think it is nuts and bolts, but it doesn't tell you how to drive the car
- workshops should present the real situations that you'll be up against as a steward

Trade Members: general membership course

- I found it good
- very informative
- agree about building a component into the membership course informing us about the shop steward role

Source: focus group discussions

Duties and responsibilities of the steward

Table 3 presents the duties and responsibilities obtained from the written responses of focus group members and the interviews of the union executive and employee relations officers. The main duties identified by both trade and civil service stewards were contract interpretation, filing grievances, representing members concerns in the workplace, acting as a liaison between the members and the union, and the dissemination of union information to members. The focus group discussion reinforced those duties and responsibilities (see Table 9). As well, stewards remarked that members often came to them with personal problems, requiring them to act as a counsellor. Non-contractual difficulties often required stewards to act as mediators between a member and management. Stewards, generally, represent the union at any disciplinary meetings for members. Both groups of stewards also believed that it was their duty to enforce the Collective Agreement in the workplace; that is, to watch for actions contrary to the Collective Agreement.

Some civil service stewards cited a need to watch for illegal deals made between management and individual members, and for intentional violation of the Collective Agreement by members (see Table 9). However, this issue was a greater concern for the trade stewards. The trade stewards described a need for the continuous scrutiny of management, to act as a "watchdog" on behalf

the members, and to "police" the Collective Agreement.

Trade members believed that the primary responsibilities of the stewards (see Tables 3 and 9) were to represent members in the workplace and at local union meetings, interpretation of the Collective Agreement, to promote union involvement, and to serve as a communication channel between member and union. Civil service members identified similar duties and responsibilities. In addition to those duties and responsibilities cited by the trade members, the civil service members cited the need to listen to members concerns and problems, to be a source of support in conflicts and to represent the member in meetings with management (see Tables 3 and 9).

Executive Members and ERO's provided similar duties and responsibilities of the steward (see Table 3). These included contract interpretation, dealing with members concerns, disseminating information to the members, encouraging union participation, and acting as the union contact to members. Grievance handling was mentioned frequently and most felt that stewards should handle the grievance at least to the first stage including determining whether a violation of the Collective Agreement has in fact occurred. If so, an attempt to remedy the issue through a meeting between the member, the supervisor, and the steward should occur. If the grievance was not resolved at the meeting, then the steward would be responsible for putting

the grievance into writing. Most maintained that the steward should be involved in the grievance process up to this stage. Some believed a competent steward should be involved to a greater extent in the process, beyond the first level.

Qualities & Skills possessed by a competent steward

Both the trade and civil service stewards concurred that a competent steward should be a leader, a communicator, a facilitator and a mediator, as well as being knowledgeable about the Collective Agreement and grievance process (see Table 4 and 10). In addition, the steward should possess good listening skills, have an understanding of the union movement, and have good judgement and people skills. The steward should be accessible to members, and have their respect.

In terms of personal qualities stewards are expected to be self confident, tenacious, assertive, fair, and remain calm under duress. The steward must be capable of maintaining confidentiality when dealing with members concerns. Stewards must be able to grasp the "real" situation, to deal with various personality types, and to have good writing and presentation skills.

The trade and civil service members agreed with the stewards on the

necessary qualities and skills that a steward should possess (see Table 4).

Civil service members believed that stewards should have a knowledge of union policies and rules, the union structure, and the Collective Agreements, that they should have the ability to resolve things expediently, and to be nonconfrontational. Members felt strongly that the steward be approachable, and a good listener, a "people person". The steward should be caring, dependable, trustworthy, fair and objective. A steward should be able to recognize a concern and know the correct course of action to take. The steward should be a leader, a communicator, and assertive.

Civil service members added that it is desirable for the steward to be outspoken, and to be a person who will not back down from an issue. They also stress the importance of the steward maintaining confidentiality and acting in an ethical manner. Some civil service members could not articulate the role played by the steward nor the skills to carry out that role.

Trade members added that the steward should be strong-willed, tactful and respected by fellow union members (see Table 4). In addition, they believed that the steward should be able to face people and fight for rights, be presentable (i.e. cleancut), as well as being able to motivate others. They also believed the steward should be a motivator and tactful.

The Executive Members and ERO's reinforced the skills and qualities

cited by the stewards and members. They concurred that the steward should have the ability to look at both sides of an issue, to stand up to the employer, not be easily intimidated, and to be a "people person". As well, they also emphasized communication, listening, organizational and public speaking skills, along with honesty, self-assurance and confidence, consistency of action, maintaining confidentiality and having a knowledge of the Collective Agreement as desirable qualities.

In terms of skills, the ERO's and Executive Members added reasoning skills, rational thinking, and the ability to compromise. They saw the steward as being able to distinguish between fact and fiction, between a grievance and a complaint, and being able to tell a member that his or her complaint did not constitute a grievance.

Situations that impede stewards in the execution of their role

Many situations make it difficult for stewards to do their job (see Tables 5 and 11). Civil service stewards noted the difficulty in getting time off work for union business, and the members' apathy. They also cited the problem that many members appear to be uninformed about their Collective Agreement and perform actions that are in violation of it. Members also fear retaliation from management resulting in an unwillingness to stand up for their

rights and file grievances. Anti-union attitudes, expressed by both management and fellow union members and poor management practices are also cited as problems. At times, problems result from a fellow steward's lack of knowledge and lack of confidence. Job stress and busy work schedules also impede the civil service stewards.

Trade stewards also mentioned the reluctance of members to pursue violations of the Collective Agreement and they noted the difficulty imposed by the time restraints and the inability to locate an area where they can talk to a member in private. As well, many members fear reprisal from management (see Table 5 and 11). The geographical layout of their constituencies are also impediments. In some locals, a steward's members are distributed over an entire county and the cost of long distance calls limits discussion of members concerns. Poor contract wording, combined with an anti-union management, creates a difficult situation. The trade stewards also state the situation of poorly or uninformed members and supervisors regarding the subject matter of the Collective Agreement. Stewards who do not undergo the appropriate training before taking up their duties place a heavier workload on the more conscientious stewards. As well, in today's economy, fear of job loss creates a situation where members are concerned only about their own problems and are easily intimidated by management. Members also develop unrealistic

expectations, the stewards are placed in a difficult position where they have to defend individuals who have given weak or false information.

Both trade and civil service members echoed many of these same concerns. Civil service members cited the isolation of certain workplaces, shiftwork, and time constraints as impediments. They also believed many stewards were not interested in being stewards. Trade members also noted the steward's workload as a problem (see Table 5). They also felt that stewards created many situations which served to undermine the steward's effectiveness. For example, a steward's lack of knowledge about union issues did not invoke of sense of trust from the members. Stewards who were outspoken on issues of no concern to the members tended to lose respect.

The Executive Members and ERO's listed the ability to get time off for union related duties as a major problem. They also remarked on the anti-union attitudes of management, and the unwillingness of employers to allow union business to take place in the workplace. They knew stewards were subject to harassment, veiled threats and intimidation. Stewards may not feel comfortable handling certain problems or a personal bias may impede effective action. As well, member's may not be comfortable taking all issues to the steward (i.e. matters of medical confidentiality, harassment). Situations occurred where the member bypassed the steward completely and contacted the

NSGEU head office directly.

Areas in which stewards should expend additional time/effort

All of the trade members worked in close proximity to their steward; therefore they had good access to a representative in the case of need.

However, they felt that they would benefit from a brief five to ten minute orientation session when they first become part of the union (see Table 6). The orientation session would familiarize the new member with the union's purpose and objectives, the use of the union dues and the role of the steward.

The civil service members, most of whom were unfamiliar with the steward's role felt the steward should be better promoted within the workplace. They suggested that the steward should educate the members about the steward's role, be more visible, be available to members, and attend local meetings. Some members believed that their steward did not address their concerns, did not appear to be knowledgeable about the union and never provided them with answers to their questions about the union (see Table 6). They wanted a greater effort directed at getting correct information to the members, and demonstrating that the union is working hard for the members. They also wanted better representation with regard to the interpretation of the Collective Agreement, staff reduction, safety at the workplace, and how the

union spends its members dues.

The ERO's and Executive Members believed that it would be useful for the stewards to spend more time orientating new members to the workplace and to the union (See Table 6). They felt that the current steward training workshops adequately prepared stewards to meet the need of their members in the workplace. Most felt that if a steward was active, there was no need for special attention in certain areas.

Steward motivation

The trade union and civil service union stewards had similar motives for acting as stewards (see Table 7). They desired fairness and equality in the workplace, to have an input into the workplace decisions, and to put an end to injustice.

The civil service members felt that stewards were motivated by their interest in the union as well as their concern about the workplace. They also believed that stewards desired to help fellow members and to be more knowledgeable about the union at the workplace. One member thought their steward assumed the position to get time off work and to take the courses, and then lost interest in doing the work associated with the position (see Table 7).

The trade members felt the stewards were motivated by a desire to

protect members' rights under the Collective Agreement and to strive for a fairer, and more consistent workplace. They also cited the steward's belief in unionism, leadership ability, positive attitude, self-esteem, and ability to motivate others as contributing factors.

The ERO's and Executive Members believed that the steward's dissatisfaction with situations in the workplace was the primary impetus for getting involved (see Table 7). Rather than sit around and complain, the stewards tried to bring about change and to resolve the inequities that existed. Often, stewards did not get involved until they filed a grievance; then they witnessed firsthand the ability of the union to help and to resolve problems. This firsthand experience led to their involvement with the union and willingness to serve as a steward. Their desire to "do the right thing" maintains their long-term, continued involvement. Some individuals may be motivated to be a steward for the wrong reasons (i.e. free weekends in Halifax, power), however, these people usually do not hold the position of steward for any length of time.

Benefits of being a steward

Civil service stewards cited self-satisfaction as a benefit of being steward (see Table 12). Trade stewards agreed, and also mentioned the

education process, the respect, and the knowledge gained from acting as a steward. By acting as steward, they become more aware of their rights, and were able to help others who could not help themselves. Interaction with other stewards was also seen as a benefit. Rank and file members cited many of the same benefits (see Table 12).

Some of the ERO's and Executive Members questioned whether there were any benefits to being a steward (see Table 12). However, most did cite the information gained by being a steward and the self-satisfaction resulting from helping coworkers. In addition, ERO's and Executive Members also noted that the steward is an entry level to the union, with possibilities for advancement into other leadership positions.

Training Needs/Steward Education Program

The Nova Scotia Government Employees Union has fairly comprehensive training programs. A general membership course is offered for rank and file members. Trade stewards have three levels of training courses; civil stewards have four levels. In addition, periodic workshops are offered on a variety of topics. Most of the stewards had completed all levels of their training. Both types of stewards felt that the union workshops were worthwhile.

The civil service stewards felt that the contract interpretation aspects of the workshops were the most useful (see Table 8). However, they did not find that the workshops built confidence (see Table 13). They cited a need for additional workshops on communication and people skills, mediation skills, management skills, contract language, labour law and leadership (see Table 8). They also thought training would be useful on issues of confidence building and the nature of arbitration. Many believed a yearly steward's refresher course would be useful.

Trade stewards also proposed a refresher course (see Table 8). They thought the existing workshops could be improved through increased role playing and re-enactments. One individual felt that even after the completion of the training sessions, stewards were still unable to react effectively to management (see Table 13). Stewards should take the training courses before actively assuming the role. As well, there should be a performance appraisal of stewards that would result in an individualized or personalized development program.

Trade stewards also proposed a semi-annual contract interpretation session to be held jointly with employee relations officers, and a yearly refresher course for those having completed the Level 3 course. They would also like to see one-day communication and leadership courses in addition to

the weeklong courses that are offered. They felt strongly about the necessity of a counselling course.

All of the rank and file members had completed the general membership course. They had found the course to be very informative and useful. They suggested adding a component that would provide the members with information about the role of shop steward (see Table 8).

The majority of the ERO's and Executive Members had completed all the available training courses. Their overall feeling was that the steward training program was excellent, second to none (see Table 8). They had high praise for the Education Officer in charge of training programs. They felt that the training was very well structured and of immense benefit to the stewards. They felt that all areas of need were being addressed; however, they were aware that certain stewards might not utilize the knowledge gained from their training. Some stewards do not appear to put their training into action. They believed that a refresher course for stewards who had completed all the levels of training would be worthwhile. One interviewee suggested that such a refresher course be offered only to those stewards who were active, to ensure that the money was well-spent.

Discussion

The purpose of this study was to gather current information on the role played by the union shop stewards. It also examined differences, if any, between trade union and civil service union stewards. In addition, it evaluated training/education programs designed for members and stewards.

Critical Incidents

The critical incident technique allowed all participants to produce behavioural examples based on their experience as stewards, or with stewards. The subject matter experts reported incidents in which they were involved or had observed. Despite the diversity in the perspective of the members, stewards, E.R.O.'s and Executive Members, there was a remarkable consistency in their behavioural examples, allowing all examples to be grouped into four general categories. These categories; collective agreement/contract interpretation, grievance handling, member orientation, and job reclassification illustrate four primary functions in which stewards are involved. They exemplify the important functions of a union steward and typify the statements made by the participants in the focus groups and interviews. The relatively low number of incidents generated by members compared to stewards most likely reflect their lack of knowledge about the role of steward. They are either unaware of what a steward is supposed to do or they have had little

contact with stewards. This may identify a problem area which needs to be addressed in future union training workshops. Either more useful information should be provided to members about the role of steward; or stewards should be given training on how to make their role better known to members.

As can be seen in the examples reported in Appendix L, stewards are involved in many incidents which affect the daily work life of their members. Poor or inadequate performance by stewards may lead to loss of benefits and rights for union members. The incidents also show that stewards devote a great deal of time and effort in amassing necessary information, setting up required meetings and doing whatever is necessary for the successful resolution of various problems.

Taken as a whole, these incidents aptly demonstrate the important role that the steward plays in the life of the union.

Duties and Responsibilities of the Steward

The union members, stewards, and Executive Members and E.R.O.'s identified a common set of duties and responsibilities. The steward is a liaison, a communication channel between the union and the member. The steward is both a resource person and a source of information regarding the collective agreement. The steward disseminates union information and

represents members in disputes with management. The steward answers any questions about the collective agreement and aids a member in filing grievances. The steward encourages the members' union participation and education.

Both trade and civil service stewards specifically cite their obligation to ensure that the contract is not violated, and to stand up for the rights of their members. The stewards noted the need for vigilance, to keep tabs on what management was doing as well as to prevent management making deals with members. Stewards also felt their duties included counselling members; as many members came to them with personal, non-union related problems.

These duties and responsibilities are consistent with those reported by McCarthy (1966) who found that stewards cited negotiation, grievance handling and discussions with union members as their primary functions. Pedler (1974) also noted the steward's function as a channel of communications, as an educator, and as a union representative in meetings with management. Partridge (1978) also reported the steward as a spokesperson, and as a two-way channel of communication between the union and workgroup. All of these studies, including this study support Nicholson's (1976) view that the role of steward is defined more so by its informal characteristics, such as communications and interpersonal skills.

Qualities/Skills of a competent steward

Generally, both trade and civil service members, stewards and the Executive Members and E.R.O.'s agreed on the qualities and skills that are needed to be a competent steward. These qualities and skills correspond well with the steward's outlined duties. The steward must be trustworthy, responsible, and well informed about the collective agreement and members' rights. The steward must be approachable, a good listener and communicator. The steward is a leader. This view is consistent with the common perception that shop stewards are the unofficial leaders of work groups (Pedler, 1973). Steward leadership functions generally fall into initiating action, facilitating consensus, and providing the "link-pin" with management, other members and the union (Pedler, 1973). However, it is an oversimplification to describe the steward as a leader or delegate, as the role varies greatly with the context and the members represented (Pedler, 1973).

This study also identified other qualities and skills desirable of a steward. Stewards must not be easily intimidated, they must be assertive, have good "people skills", be fair and objective. The stewards must have the respect of the members; if the respect is not present, members will not relate their problems or have confidence in the steward. Stewards must respond consistently to a member's concern. Stewards must be self-confident and also

decide whether individuals are telling the truth. They must also be able to say "no" in cases where members do not have a grievance.

Situations that impede the steward in the execution of their role

The study participants agreed on the impediments to a steward doing a good job. Many of these perceived obstacles are similar to those reported by Fisher and Reshef (1992) in a survey of shop stewards in a Canadian national union. Member apathy, problems from the dual role of member and steward, complexity of the collective agreement, member expectations, and pressure from management are the most cited impediments.

There are many obstacles to being a competent steward. Some of these are beyond a steward's control including personal workload, time restraints and a large member constituency. Many cite the difficulty of widespread constituencies, which include several different collective agreements and locales. Civil steward constituencies ranged from 30 to 620 members, trade steward constituencies ranged from 10 to 550 members. The range in the number of constituents represented is a similar occurrence in other unions. Pedler (1973) found that the average steward represented a constituency of 73 members, and 62% of the stewards responded that their constituencies were spread over various locations and included several different groups of employees. This situation made it necessary for the steward to conform or

understand the values and norms of each separate group (Pedler, 1973). This finding is replicated in the statements of the stewards in this study.

Some work situations make it difficult for a steward to leave their assigned work areas to meet with their members regarding problems. The steward may also have to be familiar with different collective agreements and various managers in representing large groups of diverse members. Isolated work areas or physical separation impede communication between stewards and members. Some obstacles relate to the specific individuals who act as stewards. Some stewards lack knowledge of their collective agreement, others are not trusted by their members. Some lose enthusiasm for the job in the face of indifference or negative attitudes expressed by the members.

The relationship stewards have with their own supervisors and administrators is important. Some stewards feel intimidated by management and don't want to "make waves". In some cases, the steward's have the respect and support of management while in other cases they are labelled as "the union guy". Stewards have difficulty in getting time off for union business and finding the time to address all the problems and concerns.

Apathy from union members is a considerable impediment to the steward doing a good job (Fisher & Reshef, 1992). Many members are unwilling to file grievances, are fearful of management reprisals, have little

interest in the union, and do not inform stewards when violations of the collective agreement occur. Many members are unfamiliar with how the union works and with the collective agreement. Shuller and Robertson (1984) reported similar problems in terms of member attitudes. In their study, members' unfamiliarity with the functioning of the union affected attitudes towards stewards; in addition, the members did not strongly identify with the policies and ideology of their union. Although the members showed no opposition to having the steward represent their interests, they felt no obligation to actively participate in the union or union activities.

Steward motivation

Given the obstacles to doing a good job, why do people become stewards? What motivates people to become a union representative in their workplace? Mostly a sense of fairness and a need to ensure justice in the workplace act to motivate union members to take upon the role of steward. Stewards are union members who have a desire to become more informed about the union and their rights, to see workers treated fairly under the collective agreement, and to achieve a better, fairer, more consistent workplace. These motives are best expressed in the words of one steward, "I want to know what's happening in my workplace, want to know I'm being

treated fairly, and want fair treatment practised to all" (Table 7). Others wanted to have an input in decisions that others made about their work. That is consistent with Broadbent (1989), individuals may become stewards from a desire to have input, and influence, in the workplace decision-making process.

Instead of sitting back and complaining, stewards are individuals who are inclined take action to resolve and remedy the injustice. Some stewards have become involved when, as members, they filed a grievance, and experienced a positive outcome which reinforced their involvement in the union. Clark (1988) supports this point, "... a member's perception of the grievance procedure plays a very significant part in shaping that member's level of commitment to the union. (Clark, 1988, p.6)". Pedler (1973) also notes that stewards' motivation derives from humanitarian/idealistic views such as helping other members, correcting injustices in the workplace and supporting the union, or from more achievement-oriented motives such as enjoying a sense of responsibility and achieving success in disputes.

The findings reported here are consistent with those of Moore (1980) who determined that the strongest motive for individuals to become stewards was an inability to accept disorganization resulting from ineffective or non-existent member representation. Members who became stewards had: " a) a sense of responsibility mainly to self, but partly to others, and b) a desire to

have some measure of control over the matters which are of immediate personal concern in the workplace (Moore, 1980, p. 97)". The data reported here echoes these views.

Benefits of the role of steward

There are not many benefits associated with the role of steward, as it is inherently stressful (Nicholson, 1976). Nonetheless, Pedler (1973) identified intrinsic benefits associated with being a steward. These included being better informed about members rights, the self satisfaction derived from helping others and not being take advantage of in the workplace. As well, the ability to bring about a fairer workplace, was expressed by the trade members. These factors were also cited by the participants in the present study.

In addition, the stewards mentioned the learning process, educational opportunities, the exchanged thoughts and experiences with other stewards as benefits. The Executive Members and E.R.O.'s, most of whom had been stewards, added that the role of steward provides an entry into other leadership positions in the union. They also saw the education and training as benefits. The position opens a door to a world of opportunity within the union.

Election & Recruitment of stewards

All but two of the fifteen stewards involved in this study became stewards without opposition. This is not an uncommon phenomenon as 70% of the stewards in Shuller and Robertson's (1983) study were also unopposed. This lack of opposition is due in part to complacency and apathy among the membership and the unwillingness of most people to take on the extra responsibility and workload. Many members also do not want to be placed in a position of conflict with management or to be labelled as "the union rep".

Obviously, there is a need to encourage more people to offer for the steward position. Participants believed that it would be useful to provide more detailed information of the steward's duties, responsibilities and obligations, as well as the amount of time involved in that role. Clark (1988) believed that since the role of steward is generally seen as undesirable, incentives would have to be used to recruit people to the position. These could include better compensation either in pay or in time off, greater union staff support, and increased status of the steward position. Consideration could also be given to special steward-related apparel, materials, social functions and office space. Clark (1988) also suggested reviewing the accessibility of stewards to the membership, improving their physical proximity, and increasing the number of steward representatives as incentives for people to assume the role. All of the

information obtained in this study offers support for these suggestions.

Training Needs / Steward Education program

The steward education program currently in place at the N.S.G.E.U. is highly successful and is integral to increasing the steward's knowledge and ability to fulfil their union obligations. The rank and file members found the general membership course to be useful and informative, however, they suggested that content be added on the role of the steward and the process by which one becomes a steward.

The importance of training cannot be overlooked. Education influences the steward's ability to solve problems (Shuller & Robertson, 1984). Training also helps stewards deal with conflicting demands faced in the role and in reducing role ambiguity. Training should include the role expectations of the steward position (Martin & Berthiaume, 1993).

Ellinger and Nissen (1984), in evaluating steward training asked trainers to identify the one content area that should be included in any program; 82% felt the essential topic was the investigation, identification and presentation skills of grievance handling since this was the greatest area of responsibility for stewards and their most important function. Twelve percent identified interpersonal skills, communication, motivation and coping with the

day to day stresses of the steward role (Ellinger & Nissen, 1984). The stewards in the present study responded similarly when asked about further training needs. They also felt the need for some type of refresher course, whether formal or informal. Shuller and Robertson (1984) believed that regular contact between stewards and reinforcement of previously learned material were necessary for the effective use of skills and knowledge. The stewards also felt it would be useful to come away from the courses with some type of evaluation of how they performed in the course, as well as an individual plan for their future development. The Executive Members and E.R.O.'s valued the existing education programs and endorsed the concept of a refresher course.

Job Description

The present study amassed considerable data on the role of the union steward. This information illustrates the steward's role and function in the 1990's and is consistent with data from the more recent literature. One purpose of job analytic material, like the type presented here, is to develop a job description. Figure 1 presents a sample job description based on data from the present study and material presented in the steward's manual of the Nova Scotia Government Employees Union, produced in 1994.

Figure 1.

JOB DESCRIPTION

POSITION: UNION STEWARD

General accountability

Reporting to the Chief Steward or alternatively to the president of the union local, the shop steward is accountable for personal communication with union members, enforcement of the collective agreement, the resolving of complaints, processing of grievances, and enhancing the role of the union.

Nature and Scope

This is one of several other union steward positions reporting to the chief steward/president of the local. Others reporting to the president include vice-presidents (3) and a secretary-treasurer. Where the union local is a large organization of diverse functional groups, local sub-units of the of the local may be put in place. Where this occurs, each shall have a shop steward position.

The shop steward position is one steeped in union history. It was put in place when the first unions were organized. The functions and authority of the position have been changed over the years with the functions becoming more broad and the authority to instigate "wild cat" strikes becoming diminished. The need to have excellent communications

on an interpersonal basis with employees is required. Awareness of employee problems when they first occur is to be pursued. The union steward enhances the role of the union by understanding the problem and the employee's viewpoint then taking effective action on a timely basis.

A key function is to enforce the collective agreement. The union steward must have detailed knowledge of the clauses and their interpretation, particularly of those which relate to the employees within their jurisdiction.

Work related problems of the employees are to be understood with the position of the employee being advocated in representation to management. If requested by the employee, the union steward may attend disciplinary interviews to advise the employee of his or her rights. Other employee problems are to be assisted in programs presently in place or contemplated. The benefits of union participation are to be communicated to new employees. Special programs are to be put in place to encourage participation of inactive employees in union activities.

The union steward develops understanding of issues, functions and practices by attending seminars, workshops, training sessions, etc. Other members are also encouraged to attend appropriate sessions.

Policies, procedures and the union's position on issues, together with associated reasons are communicated to employees. As well, issues of concern to employees are communicated to union officials. Absolute confidentiality of employee's personal issues/problems, etc. is maintained unless otherwise authorized by the employee. No bias is countenanced on the basis of colour, religion, ethnic origin, etc.

Preparation of reports, the administration of records, files, etc. is carried out. Particular emphasis is placed on memberships records, the processing of grievances, forms, etc. The incumbent relates to employees, foremen, supervisors and management internally and externally to union officers, negotiating and other committees as well as consultants.

The major challenge of this position is to represent the members position to management when problems in the workplace occur. This may be within the terms of the collective agreement or otherwise.

Specific Accountabilities

1. Respond to all complaints, grievances and other issues raised by employees. Gain an understanding of the employees position and advocate that position in resolving the problem in meetings with management, etc.
2. Attain a detailed knowledge of the collective agreement and the interpretation of clauses, especially those

which affect the employees within the union stewards' respective jurisdiction. Police the agreement ensuring that all clauses are implemented.

3. Process formal grievances as per the collective agreement on a timely basis, while attempting resolution at each stage or level of processing.
 4. Meet with and introduce new employees to other union members, assist in their integration within the union with associated union cards being signed.
 5. Generate new programs and utilize existing union programs to advance participation by union members. Special emphasis is to be placed on inactive and new members. The attendance at regular meetings, educational workshops, seminars, training sessions, etc. is to be promoted.
 6. Maintain and enhance good interpersonal communications with employees, without bias. Provide assistance to solve their problems while maintaining necessary confidentiality. Communicate union policy and the position on issues with underlying reasons to the membership. Distribute publications, information releases, etc. using bulletin boards, union meetings and individual contact.
 7. Ensure that union manuals, reports, forms, files, etc. are maintained on a consistent basis. Files on complaints, grievances and their resolution are to be prepared and acted on a timely basis.
 8. Participate with and assist the staff of the union, etc., to advance the cause of the union within its constitution and regulations.
-

Limitations of the study

The principal limitation of the present study is the representativeness of the sample. The stewards and members who participated were thought to be the best representatives of their population. They were not chosen randomly. However, this small groups provided a great deal of information about the role of the union steward. All had taken the general membership course, indicating some interest in the union, however, several did not have much personal contact with their steward or a good understanding of the steward's role. Therefore, some qualifications must be given to the data obtained from the rank and file members.

Future Research Considerations

This comprehensive examination of the role of union steward suggests many areas for future research. It would be useful to replicate the present study with a larger sample of stewards and members, in order to further validate the general nature of the findings. Alternate research techniques such as log books or diaries could also be used. Along this line, greater attention should be given to the specific areas addressed by stewards and the amount of time devoted to specific duties.

The leadership function of the steward was not examined in great depth

in this study. Stewards do not generally tend to be "natural leaders" (Moore, 1980). Future research should explore this avenue of stewardship.

Conclusions

The union steward occupies a key position as the union representative in the workplace. The steward acts as decision-maker and facilitator to rank and file membership activity (Nicholson, Ursell & Blyton, 1980). The steward has a critical impact in the grievance process (Dalton & Todor, 1982). The action and comportment of the steward in the grievance procedure plays a role in a member's perception not only of the process itself but of the union in general.

The steward's handling of a grievance also plays a significant role in shaping the member's degree of union commitment (Clark, 1988). A great deal of grievance handling takes place informally and may or may not result in a grievance being filed (Broad, 1983). Many of the duties of stewards involve answering questions in regard to the collective agreement. Questions are often the first stage of a grievance procedure, determining whether violations of the collective agreement have, in fact, occurred. The steward's approachability and accessibility are critical elements in this process.

It is difficult to clearly define the role of steward due to the diversity of

contexts in which a steward operates. Broad (1983) stated the need for stewards to be flexible in their leadership and to have the ability to adapt to the situation and context. What is noteworthy in the present study is the consistency in views about the role of steward obtained from rank and file members, stewards and the Executive Members and Employee Relations Officers. This consistency was maintained across the data collection techniques, further validating the accuracy of the obtained information.

Interestingly, there did not appear to be any significant differences between the civil service and trade union stewards. Both contexts included managers who were supportive and respectful of the steward, and others who expressed anti-union attitudes. Overall, a consistent picture of the role of steward emerges across all groups studied. The job description presented in Figure 1 represents this view of the steward.

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APPENDIX A

Please answer the following questions. Please do not put your name anywhere on this page. All information is anonymous and confidential.

1. I am a male _____ female _____
2. My age is _____ years.
3. I have been a member of the NSGEU for _____ years.
4. (If applicable) I have held a union leadership/shop steward position for _____ years.
5. (If applicable) In my role I represent _____ (number) of people.
6. I have participated in the following training workshops/courses: Please circle and indicate how useful you found each workshop. 1=very useful 3=somewhat useful 5=not very useful

YES NO	a. LEVEL 1	1	2	3	4	5
YES NO	b. LEVEL 2	1	2	3	4	5
YES NO	c. LEVEL 3	1	2	3	4	5
YES NO	d. LEVEL 4	1	2	3	4	5
YES NO	e. Inlocal workshop-contract clause negotiation	1	2	3	4	5
YES NO	f. NSGEU weeklong school: communication	1	2	3	4	5
YES NO	g. NSGEU weeklong school: leadership skills	1	2	3	4	5
YES NO	h. NSGEU weeklong school: political economy	1	2	3	4	5
YES NO	i. ARLEC	1	2	3	4	5
YES NO	j. Labour College of Canada	1	2	3	4	5
YES NO	k. Labour Council Workshops	1	2	3	4	5
YES NO	l. NS Fed of Labour Workshops	1	2	3	4	5
YES NO	m. Labour Council; union counselling program	1	2	3	4	5
YES NO	n. Other _____	1	2	3	4	5

7. Do you expect to offer for any NSGEU position in the future?

yes no (please circle)

APPENDIX B

Please answer the following questions. Please do not put your name anywhere on this page.
All information is anonymous and confidential.

1. I am a male _____ female _____
2. My age is _____ years.
3. I have been a member of the NSGEU for _____ years.
4. (If applicable) I have held a union leadership/steward position for _____ years.
5. (If applicable) In my role I represent _____ (number) of people.
6. I have participated in the following training workshops/courses: Please circle and indicate how useful you found each workshop. 1=very useful 3=somewhat useful 5=not very useful

YES NO	a. LEVEL 1	1	2	3	4	5
YES NO	b. LEVEL 2	1	2	3	4	5
YES NO	c. LEVEL 3	1	2	3	4	5
YES NO	d. Infocal workshop-contract clause negotiation	1	2	3	4	5
YES NO	e. NSGEU weeklong school; communication	1	2	3	4	5
YES NO	f. NSGEU weeklong school; leadership skills	1	2	3	4	5
YES NO	g. NSGEU weeklong school; political economy	1	2	3	4	5
YES NO	h. ARLEC	1	2	3	4	5
YES NO	i. Labour College of Canada	1	2	3	4	5
YES NO	j. Labour Council Workshops	1	2	3	4	5
YES NO	k. NS Fed of Labour Workshops	1	2	3	4	5
YES NO	l. Labour Council; union counselling program	1	2	3	4	5
YES NO	m. Other _____	1	2	3	4	5

7. Do you expect to offer for any NSGEU position in the future?

yes no (please circle)

APPENDIX C

Please answer the following questions. Please do not put your name anywhere on this page.
All information is anonymous and confidential.

1. I am a male _____ female _____

2. My age is _____ years.

3. I have been a member of the NSGEU for _____ years.

4. (If applicable) I have held a union leadership/shop steward position for _____ years.

5. (If applicable) In my role I represent _____ (number) of people.

6. I have participated in the following training workshops/courses: Please circle and indicate how useful you found each workshop. 1=very useful 3=somewhat useful 5=not very useful

YES NO	a. GENERAL MEMBERSHIP COURSE	1	2	3	4	5
YES NO	b. OTHER _____	1	2	3	4	5
YES NO	c. OTHER _____	1	2	3	4	5

7. Do you expect to offer for any NSGEU position in the future?

yes _____ no _____

APPENDIX D

GENERAL QUESTIONS

- 1. What do you feel are the main duties/responsibilities of the steward?**
- 2. What situations make it difficult to do your job effectively?**
- 3. List qualities and skills that a competent steward possesses.**

4. What qualities/situations in the workplace prevent you from doing your job well?

5. Approximately how much time do you spend per week on steward duties?

6. What changes would you like to see in the workplace that would make the steward's job easier?

7. List any training areas/skills that you would like to see offered for stewards to improve one's ability to do the job.

8. What motivates you to be a steward?

9. Did you come into the role of steward unopposed? yes _____ no _____

If yes, why do you think you were the only person to offer for the position?

APPENDIX E

4. What qualities/situations in the workplace prevent your steward from being as effective as he/she could be?

5. List any situations/areas that you would like your steward to spend more time/effort on.

6. What do you think motivates an individual to assume the role of steward?

APPENDIX F

BEHAVIOURAL EXAMPLES HANDOUT

What is a behavioural example?

A behavioural example is a specific and memorable action or behaviour that recently occurred which serves as a good example of a specific idea or concept. Behavioural examples provide an excellent means of illustrating key concepts in specific terms.

Key Characteristics:

- 1. A behavioural example is specific. It portrays in sufficient detail an event so that several people knowledgeable in the area can easily picture the incident in the same manner.**
- 2. A behavioural example focuses specifically on behaviour. It should describe in concise detail what a person did. The focus of the example should be on what a person did, preferably in terms of observable actions, in a certain situation.**
- 3. An example must briefly describe the context within which the behaviour occurred. A limited description of the circumstances helps in understanding whether a behaviour was effective or not.**
- 4. The behavioural example should briefly describe what consequences occurred as a result of the action. The effectiveness of a specific action is often determined by the consequences that result from the action.**

ILLUSTRATIONS OF BEHAVIOURAL EXAMPLES:

- A poorly written behavioural example

"The union steward studied the section on grievance procedures a lot while attending a union course. As a result, he passed the union steward training course."

- A well written behavioural example:

"The union steward spent a whole night studying the section on grievance procedures while attending a week long union course. At the end of the course the steward could competently discuss grievance procedures and regulations. As a result, he was in the top 25% of those who passed the union steward training course."

APPENDIX G

EFFECTIVE PERFORMANCE INCIDENT

A. What were the circumstances leading up to the incident?

B. What did you observe the steward doing?

C. What was the outcome of what the steward did?

APPENDIX H

INEFFECTIVE PERFORMANCE INCIDENT

A. What were the circumstances leading up to the incident?

B. What did you observe the steward doing?

C. What was the outcome of what the steward did?

APPENDIX I

OPEN DISCUSSION QUESTIONS FOR STEWARDS

- 1. How do you perceive the effectiveness of the steward program?**
- 2. Aside from the educational components, what other forms of support can the union provide to make your job easier?**
 - a) steward meetings**
 - b) additional training - what kind of training: skills, knowledge, attitude**
- 3. How would you like to see the steward role expanded?**
i.e. the grievance handling process
- 4. In what role do you see the chief steward as a support mechanism: What should be their role in enhancing your position as steward?**
- 5. How frequently should stewards meet?**
- 6. What should be the purpose of steward meetings?**
- 7. On what issues do you spend the majority of your time?**
- 8. How do you feel the workshops have impacted or contributed to your confidence and commitment?**
- 9. a) What are your opinions on the format of the workshops?**
b) of the Friday/Saturday format
- 10. What do you feel can be done to encourage individuals to take on the role of steward?**
- 11. What are the benefits associated with the steward role?**

APPENDIX J

OPEN DISCUSSION QUESTIONS FOR MEMBERS

- 1. What is your relationship like with your steward?**
- 2. Do you know the name of your steward?**
- 3. Do you feel your steward does his/her best to reflect your concerns?**
- 4. What do you feel can be done to encourage people to take on the role of steward?**

APPENDIX K

INTERVIEW QUESTIONS FOR ERO'S & EXECUTIVE

- 1. What do you feel are the main duties/responsibilities of the steward?
-difference between civil and trade union sectors**
- 2. Approximately how much time do you think stewards spend on union duties per week?**
- 3. In your opinion what qualities and /or skills do you feel a competent steward possesses?**
- 4. What qualities/situations do you feel exist in the workplace that may impede your stewards from being as effective as they could be?**
- 5. What are situations or areas that you would like your stewards to spend more time/effort on?**
- 6. What do you think motivates an individual to assume the role of steward?**
- 7. What is your opinion of the NSGEU steward program?**
- 8. How effective do you feel the steward program is in terms of steward development? What are the shortcomings?**
- 9. In order to get a representative view of the steward's job, it is important to have specific behavioural examples of stewards' actions. Try and think of situations where a steward's actions were particularly effective.**
 - What were the circumstances leading up to the incident?**
 - What did you observe the steward doing?**
 - What was the outcome of the steward's actions?**
- b) Now try and recall situations where the steward's performance was particularly ineffective (cover same areas as above)**
- 10. Do you think stewards should meet on a frequent basis? How often?**
- 11. Should these meetings take place during office hours?**
- 12. What do you feel can be done to encourage individuals to take on the role of steward?**
- 13. What are the benefits associated with the role of steward?**
- 14. Describe your role as ERO (or as applicable).**
- 15. How does the steward program affect your job?**
- 16. What do you feel the steward should be doing in helping you as related to your job? Give examples. ie. grievance handling**

APPENDIX L

CRITICAL INCIDENTS
TRADE UNION MEMBERS

EFFECTIVE (1-5)

1. a) the collective agreement requires an employer to give employees 4 weeks notice as to shift change. When it became necessary to extend the hours of operation the employer needed to change the employees shifts. The new schedule was given to the employees 3 weeks prior to the planned implementation date

b) the steward approached the manager and stated that the employees could not accept the new schedule as it stood because of the fact that 4 weeks notice was not given.

c) the implementation date was changed to allow for 4 weeks notice.

2. a) new employee arriving on the job, never been a union member. As part of the orientation process and his steward duties/leadership, the steward recommends a general membership course to make the employee knowledgeable of the union

b) steward signed the new employee up for a day and a half workshop, stating that it would help him/her understand the role of the union. Steward permitted time-off to attend this course because he happens to be the employees boss as well.

c) The outcome allowed the new employee to gain good insight and knowledge of the union and to be more aware of the union. The employee felt more at ease with this knowledge and where the union dues were going and who to approach with a grievance.

3. a) a casual worker was given hours before an RPT. The coordinator that is responsible for scheduling hours thought she was already working that day. She filed a grievance.

b) I made sure the grievance was submitted within the appropriate time. I sat down with her and helped her write it, making sure all the details were included and that it was worked properly.

c) the person won their grievance.

4. a) For the first time two union members wished to job share. Due to the fact that this had not happened before, several meetings took place to lay down the guidelines for job sharing (i.e. # of vacation days, relevant deductions, benefits lost and maintained). Agreement was met in all areas except long term disability payments.

b) the steward contacted the ERO to clarify the collective agreement interpretation of the matter

c) the ERO clarified the collective agreement and the matter was settled.

5. a) Approx. about a week before we went on strike which was determined by negotiation falling through the workplace went on a slow down to about 50%, enough to keep us from being suspended or fired. We then went on strike for a week then returned to work.

b) a day or 2 later my steward and I were called into the bosses office. I was being written up and forced to sign the letter. It pertained to the slowdown. I didn't want to sign it but my steward advised me to and state below disagree

c) A short while later I found out through my steward that the letter was removed from my file

INEFFECTIVE INCIDENTS (6-7)

1. a) The collective agreement of our local covers all permanent full-time employees as well as temporary full-time employees. The collective agreement states specific clauses which do not cover the temporary employees. A group of temporary employees, after reading the coll.agree. discovered that the health benefits and superannuation benefits were clauses that did not cover temporary employees. They were not however, receiving these benefits.

b) The steward set up several meetings with very angry employees. She contacted the ERO for further advice.

c) The employees were not satisfied with the union's position on this matter so they hired their own litigation lawyers.

2. a) A grievance was filed regarding a junior person getting hours to work before a senior person. A grievance was filed.

b) The grievance was poorly written and gave few details about the alleged incident

c) the grievance had to be rewritten by a steward from another store. I do not know the outcome of the grievance

CIVIL SERVICE MEMBERS**EFFECTIVE INCIDENTS (8-12)**

1. a) I was asked what would happen if a person was on sick leave during an unpaid layoff day
b) phoned chief steward and she looked into it
c) call was returned from chief steward and answer was given through the steward to person concerned
-

2. a) saw a need
b) encouraged an employee to get union education
c) person accepted the challenge and attended course
-

3. a) a change in rotation for staffing occurred. In that change-staff member noted a loss in shifts (due to the turnover in rotation). She actually worked 1-2 more. This was brought to the attention of the head nurse but did not agree. Staff member took it to steward.

b) steward reviewed the rotations. Spoke to head nurse to no avail. The chief steward was brought in = no headway. Steward assisted staff member with grievance and accompanied her to sessions

c) grievance was won

4. a) staff member requested for more than 2 weeks vacation during summer. Head nurse refused.

b) arrange to meet with management. Head nurse and director to discuss this aspect of the contract. Management stand was two weeks vacation only. The chief steward was then brought in for further discussion

c) A grievance was not filed. management agreed they would not win a grievance and decided to grant the vacation time

5. a) members in the workplace were not attending local meetings, union courses or any other union related activities.

b) the steward kept members informed and continuously encouraged members to get involved

c) several members began getting involved. Some very actively and others sporadically but interest was increased.

no ineffective incidents

CRITICAL INCIDENTS **TRADE UNION STEWARDS**

EFFECTIVE INCIDENTS (13-23)

1. a) One employee worked when another should have, because of seniority list

b) called mgr. involved, advised him he called someone in to work with less seniority than the other person, he would have to pay both people, he said he wouldn't pay both people to work. Then I advised reg. supervisor a grievance was coming in on this.

c) before grievance got there the grievor told me he was getting paid for his hours, a phone call was made from manager to him.

2. a) employee approached the steward wondering about becoming a term employee or full-time employee (was currently working as a casual employee)

b) 1/ steward requested pay stubs from previous years to determine number of hours worked
2/ reviewed contract clauses (definitions of employees, hours of work, benefits, etc.) to determine if a violation had occurred

3/ reviewed clauses with employee

c) 1/ set up meeting with manager of employee (informal step)

2/ upon conclusion of informal hearing - contacted mgr. of Labour relations re. outcome and further attempt to resolve

3/ manager of Labour relations offered solution

4/ rejected by employee and union steward

5/ moved to file grievance at level 1

6/hearing at level 1 - presented evidence

7/ employer responded after hearing - met demands of the employee's grievance for corrective action

3. a) there were increased occurrences of disciplinary letters being issued to members reflecting borderline violation of the contract, member abuse and intimidation by mgt. and emphasizing varying degrees of discipline towards members which were not indicated at their respective

disciplinary meetings.

b) I verified that even though it is not in our contract, case history supports the right of a member to have a shop steward present at any disciplinary function. I communicated this to the membership, informing them to avoid hesitation in contacting their union rep when possible, and where time may not permit, advising management that they are aware of their rights to representation!!!

c) an increase, possibly in appearance only, of management adherence to contractual procedures. An invitation myself by a member to a proposed disciplinary hearing, acceptance by management of my presence, followed by reasonable disciplinary action, for the situation by management, as opposed to suspension which had been the norm.

4. a) union member (with health problems) was experiencing numerous sick days.

-employer began harassing employee

-several letter written by supervisor were written to employee regarding attendance and included in letter were numerous references to specific diagnosis (letters typed by secretary, filed by file clerk, reviewed by dept. managers, etc.)

-union member felt she was harassed and that confidential health info. was unnecessarily disclosed to other staff

b) 1. for level 1 of grievance, I met with the employer/supervisor and union member to request
a) letters be removed from employee file b) future references to specific diagnosis be terminated
c) letter of apology to union member

2. level 1 led to level 2 (ie. filing of grievance)

-counselling was given to employee regarding her absenteeism ie. enforcing union's position on sick time abuse; ensuring employee obtained proper documentation when absent; advising her of the progress of the grievance

c) somewhere between level 2 and level 3 : supervisor was negligent in violating employee confidentiality in regards to her health information. The employer lacked a structured policy on 1) who should retain health info. of employees and 2) where this info should be kept

-a new absentee form was generated, consisting of 2 parts; top part would contain general info (ie. staff name; days absent; date of return; dr.'s name) and this would be kept in employee's file in supervisor's office. Bottom (detachable) part filled out by doctor containing confidential health info. This part would be placed in head office, accessible only to the CEO and his/her assistant. Letter of apology was sent to employee

5. a) the boss was getting upset with the number of late arrivals for work in the morning. He said that everyone who was more than 5 minutes late from now on would be docked half an hour

pay, so we went to the locker room to wait till half past before starting work. Boss came in and asked if we were going to work that day and I said yes but not till half past since we were not being paid. He said ok and left. When we went to go to work he called us unto his office and suspended us indefinitely for refusing an order from him to go to work.

b) I filed a grievance stating that since he had never given us a direct order to go to work the suspension was wrong

c) after a step two meeting with the director of operations where I explained my side we were re-instated and told we would receive our pay. When we got our cheques with the money 4 months later we were paid for a full 8 hours on the day in question.

6. a) overtime was being worked on Wednesday night and (Name), who was a senior man was working in another job on this day. He came to me Thursday and asked why he was not included in the overtime shift (a cost of over \$100 was involved)

b) I went to the warehouse manager and asked him why he had not invited (name) to work. He told me he was not responsible for tracking down this person and since the announcement was made over the PA system, he did not have to worry about it. I told him that since he had sent this person out of the building that day that he was responsible and this person would have to be paid or we would grieve.

c) On Friday morning I was approached by a supervisor and told that (name) was going to be paid.

7. a) employee given written disciplinary letter with respect to poor judgement in a clinical situation. Steward approached by employee who felt it was an unfair decision by his supervisors

b) 1/ gathered evidence from employee including written documents, dates, witnesses, etc.

2/ consulted coworkers re; situation, what they would have done. Put into writing.

3/ reviewed employee's performance appraisals from previous years, attempted to identify any hidden agendas (personal conflicts)

4/ reviewed contract clauses in relation to discipline and hospital policies and procedures into environmental leave and return to work protocol

5/ reviewed health status of grievor with grievor

c) 1/ met with supervisor (informal step), agreed to disagree

2/ filed level 1 grievance

3/ grievance hearing held-grievance denied

4/ filed level 2 grievance

5/ involved ERO in process

6/ level 2 grievance hearing held

7/ managements proposal for resolve accepted by grievor and union

8. a) employer attempted to change schedule/shift changes with only 2 weeks notice (collective agreement states you must have 4 weeks notice)

-waiting the required 4 weeks would cost the employer lots of \$\$ in overtime

-new schedule (with only 2 weeks notice) was posted for staff

b) Level 1; spoke with employer/supervisor on behalf of the staff. Both sides of the situation discussed ie. \$\$ vs. collective agreement

c) new schedule was enforced by mgt. ; but staff were paid overtime for difference between old schedule and "new" schedule for the 2 week period

9. a) a volunteer was brought into a school to do office work (volunteer was a "work experience student") and was given duties for more hours (100%) than the regular secretary position

b) the steward met with Principal (1st level) and explained if there was enough work in the office to keep a volunteer 100% then the 50% secretary should be given the work as a bargaining unit position - not volunteer

c) the Principal immediately reduced the volunteer hours to match that of the 50% secretary - making the volunteer work assisting the secretary, not replacing her. The whole process took 2 weeks and was resolved at the first level.

10. a) a secretary applied for 3 days vacation re; article x of the collective agreement. The principal denied leave because there would be no replacement (as agreed by mgt. in the collective agreement)

b) met with Principal and Vice-principal stating the collective agreement stated that "leave would be granted pending operational requirements". Since this was April and not bothering school registration in Sept. or school closing in June there was no "operational requirement" at this time.

c) the principal realized there was no real grounds to base his decision of denial of leave, other than he did not want to answer phone or take messages, the secretary was granted the leave.

The whole process took 7 days, was resolved at first level.

11. a) job posting to fill 3 positions for the same job; over a dozen people applied. One of the 3 successful applicants was junior to 4 of the unsuccessful applicants. All of these people had the same skill, ability, knowledge of the job if not more than the junior person. These 4 unsuccessful applicants were not happy with the final outcome and came to the union for advice.

b) First I arranged a meeting with a large group of unhappy members (14). Explained the grievance procedure and listened to their complaints. From this meeting another meeting was set up for those who wanted to file a grievance re: job posting. The process was explained to these individuals and we proceeded.

-there was 5 people originally that wanted an informal meeting with the selection group (info was gathered and questioning of selection)

-from this meeting there were 4 people who wanted to file a grievance. This was again explained to them the process and what the outcome could bring

c) first level of the grievance; these individuals had a chance to explain what happened and why they believe they should be the successful applicant. At this level I had the opportunity to show where there were inconsistencies in the scoring and that all these people had more knowledge and skill and ability than the junior person.

results: executive director stated a new competition should take place, all three people who are in the job now will have to compete with everyone else. The 4 people who grieved were not happy with this decision so they decided to go to the 2nd step. just to have the facts heard at a higher level. The final result: to clean up past practices re: job postings

trade stewards

INEFFECTIVE INCIDENTS (24-28)

1. a) overtime was worked one night with only a small number of people called back. A senior clerk was left out of the shift. He approached me and asked if I would grieve for him. Management maintained that since operation of a crown forklift was involved and he was not qualified that he would not be paid.

b) At step 3 of the grievance procedure I told them that since the overtime involved loading trucks and a crown forklift cannot be used for this job that they were wrong in denying my member his money. The said that another member was willing to testify that he had been brought back that night to operate the crown (a very large forklift with stacking capacity of 5 full pallets)

c) after a meeting of the grievance committee the grievance was withdrawn against my vote

2. a) a bargaining unit position was vacated through a retirement. The school board did not fill immediately causing heavier workloads on remaining members in the department

b) filed a grievance on failure to post a position

c) the school board countered with a reply of "because of in-house restructuring the job no longer existed". The process lasted 3 months, resolved at the first level (lost), frustrated, not in our favour.

3. a) death in the family, management advised employee would be paid then said they wouldn't get paid

b) advise person to write up grievance on mgr. work

c) contract stated the employee would not get days paid because of wording in contract

4. a) member made long distance personal call, did not inform management

b) talk to mgt., gathered facts from both sides. what was the discipline, what was past practice

c) member suspended for 1 day and had to pay the cost of the phone calls back

5. a) I received a letter of discipline from our employer recommending the termination of a long term employee for consistently ignoring employer policy.

b) I filed grievance. I initiated an investigation into the allegations including the history of problems related to this member, received confirmation in writing that the allegations were true, and in addition to contravention of Board policy, they were also in violation of the Motor Carrier Act in a very serious area.

c) A hearing was called for the Grievance committee with the member in attendance. He admitted to the accusations yet could not come to terms with the significance of the seriousness of his actions. It was voted to withdraw the grievance, the member attempted to sue for lack of representation, he was unsuccessful.

CIVIL SERVICE STEWARDS

EFFECTIVE INCIDENTS (29-46)

1. a) A new position was developed for the workplace without union consultation. It has not been given a classification. A job description has been circulated to all managers and work areas

b) a copy of the new position's job description was given to the ERO.

c) a policy grievance has been filed. The position has not been filled at this time

2. a) staff working "on call" while in their homes were not being paid overtime for the amount of time spent "working", ie. time spent on phone with patients answering their questions re: home dialysis

b) staff were encouraged to keep time records from when the pager notified them of a call until the call was completed. A grievance was then filed.

c) Arbitration is scheduled

3. a) Secretaries in my office had been promised that the civil service commission was looking into a reclassification for them for the past year. The secretaries came to me as steward to pursue a job reclassification.

b) I explained the procedure to the secretaries and supported them throughout the process; this included attendance at meetings with the district supervisor who tried very hard to convince them he had their best interests at heart and they should withdraw their appeal

c) the reclassification moved along much more rapidly than it had prior to their appeal; the secretaries were successfully reclassified and received some back pay.

4. a) My employment anniversary is Feb 1. My supervisor does my evaluation at that time in 1993. She never wrote my evaluation up. In May of 1993 she instead wrote a letter detailing performance shortcomings and stating that she was deferring my evaluation for 3 months during which time I was to correct my behaviour. In June of '93 I received a letter from the Civil Service Commission saying I would be granted my annual pay increment back to May 1, 1993 (effectively denying my increment for Feb, March, & April, 1993).

b) my first response was to ask my immediate supervisor why there was a 3 month loss of increment. Getting no response from her I phoned personnel who said increment decisions are based on supervisor or Deputy Head recommendation. I then asked the District Supervisor to look into the matter. The District Supervisor reported back that when my evaluation was deferred for 3 months I lost increment for 3 months. I wrote the dist. supt. a letter and quoted the contract clause that states that I must be notified in writing of loss of increment and asking him to reconsider his position. When there was no change in the situation I filed a grievance.

c) At second level I won my grievance which got me \$400 in increment that had been denied.

5. a) Our department had been working on a two shift system 7:30-15:30 and 8:00-16:00 depending on the employee's preference, when the dept. manager one day ordered all the members of one shop to report for work for the 8:00-16:00 shift the next day. This was against the collective agreement which states that to change a person's shift, 2 weeks notice in writing (to be posted) is required

b) I informed the employees of their rights which resulted in two members filing grievances which I personally handled. A 1st level grievance meeting was held.

c) The manager conceded that he was wrong and returned the employees to the 7:30-15:30 shifts where they remained without change.

6. a) Instructors in workplace been treated unfairly as opposed to those in other institutions, ie. March break, length of teaching year, etc.

b) formulated a petition which was signed by all instructional staff. This petition was delivered to the Minister of Education.

c) the staff were then treated in the same manner as those of similar institutions

7. a) an instructor was struck by a student causing a severe back problem. Management allowed the student the right to return to class the next day

b) filed a grievance under "unfair labour practices" by management

c) this case is still in process

8. a) management gave to two instructors a directive that the instructors had to go out on work experience

b) filed a grievance because both the instructors were working beyond the required # of working days

c) through arbitration, the grievance was lost because of the interpretation of the contract re: "working days". This point became an issue for the following round of contract negotiations

9. a) personality conflict between supervisor and member. Both are union members. Letter of reprimand placed in file of the aggrieved

b) meeting with aggrieved, supervisor and H.R. rep arranged. Discussion and request for letter to be pulled from file. Request for mediator in poisoned workplace dealings to be present during discussions between member and supervisor. Request from steward that resented duty be deleted.

c) duty deleted, letter pulled from file with memo to that effect sent to all present. Mediator being sought.

10. a) the steward received a call from a member that she had been suspended from work. This individual was suspended several days (6) prior to contacting the steward. She was being refused the right to return to work.

b) after receiving the call I had the member come to the workplace to answer a few questions about the matter. Upon questioning I found the member had been reprimanded on several occasions about lateness and A.W.O.L. and had received letters of discipline. A grievance was filed for "just cause" and suspension

c) After level 3 hearing staff member was reinstated with full pay (no loss of pay) after being off for close to 1 month

11. a) supervisor (head nurse) had requested a meeting with steward in her capacity of employee. Suspecting a reprimand and possible intimidation steward requested union participation. Denied by supervisor. Ordered into office. Steward carried out order but was suspended for insubordination, refusing a direct order.

b) questioned the supervisor about the situation. After a half hour of discussion established that individual had not been insubordinate. File grievance on just cause.

c) suspension lifted with no loss in pay or reprimand to the member. Head nurse reprimanded by her superior for jumping the gun.

12. a) An employee who had previously been reprimanded for alcohol use on working hours showed up for work severely hung over and still half drunk. He explained this to his supervisor and requested a day's sick leave. The next day he went to work, was told to report to the supervisor who then demanded his resignations. He complied.

b) Another employee, a friend of the individual concerned contacted me and asked if I could do anything. I told him that could only make the decision when and if the person themselves requested it. The friend told the person to call me. He did. I explained that I had to know all the detail of his alcohol use/problem for background and I would do my best, but that there were no guarantees as many factors had to be weighed.

c) the individual agreed to take his chances and grieve the situation and is currently awaiting arbitration. I try to keep him abreast of any developments in his case.

13. a) Employees had been given inadequate notice of a change in working hours. While most were willing to apply for overtime and grieve the fact, some, in a particular work area, were reluctant. These people were told that they did not have to change and did so voluntarily. Therefore they felt no reason to grieve or apply for overtime.

b) In speaking with members of this area I explained that it was not the fact that they worked or not that was the issue, but rather that they had not been given the required amount of notice as agreed to in the contract.

c) as a result of explaining the inadequate notice argument to these members, many are now filing for overtime for the time worked and to follow through with the grievances.

14. a) Unclear of contract interpretation of vacation seniority for various bargaining components working in same area, who would have more seniority, i.e. RN, CNA, PNO.

b) reread pertinent articles, consulted with other stewards for their interpretation, consulted pay office for their version, consulted ERO for verification

c) verification of seniority rights within the workplace, according to areas - years of service maintained seniority over differing bargaining components

15. a) A steward was having difficulty dealing with a supervisor, having many confrontations about being a steward and her right to represent fellow employees (handling grievances)

b) -spoke with steward to encourage her to follow guidelines laid out in the contract, following workplace regulations as well, and to keep personality conflicts aside.

-spoke with manager to reinforce the employee's right to have union representation if needed and ask her to respect the role of steward

c) Both sides seemed better able to deal with the situations at and rather than having personal conflicts during the grievance process.

16. a) a member came to tell me that she is a lesbian and that her lover had just been diagnosed

with cervical cancer and she wanted time off for family illness

b) I told her that unfortunately the collective agreement pre-dates recent changes to the NS Human Rights Act and then requested a legal opinion through the ERO - a negative response came back about 3 months later - too late to have helped her situation at the time

c) Together we spoke to her supervisor who was prepared to liberally interpret her (PR) overtime and was surprisingly supportive. I submitted a proposal to the PR bargaining unit rep to amend the collective agreement on spousal benefits etc. for same sex relationships and complained to G.A.L.A. to ensure they would also pressure.

17. a) Following a reorganization, 2 members, each with 28 years service found they had to compete with each other for a position classed higher. Management later amended this offer to say they could job-share. They had each expected a reclassification out of the reorganization and felt the union was at fault for not fighting for them.

b) I physically brought the 2 to (Name) at the NSGEU who felt they should appeal their classification up 2 levels

c) Human Resources agreed to their reclassification up 1 level (plus 1 increment as one of the members was eligible for early retirement) without going to appeal. One of the 2 was then very angry that I had not talked him into appealing earlier.

18. a) A distraught member came to me with a letter of reprimand from management. The letter stated that he had refused to perform as required. He had a one inch thick file which demonstrated he had completed the required tasks and he felt management had a grudge against him.

b) Together we reviewed the collective agreement re: unjust punishment and contacted the ERO who felt he had a clearcut case and a grievance was filed.

c) At third level, management agreed to remove the letter, but to issue an oral reprimand. The member felt this implied he was in the wrong and wanted to go to arbitration. He is presently on long term disability for stress as a result of this incident. He agreed, on union counsel for the NSGEU to deny his culpability in writing. The ERO handled the grievance, but his stress induced illness is not being addressed.

CIVIL SERVICE STEWARDS**INEFFECTIVE INCIDENTS (47-51)**

1. a) Member was told by her supervisor that she would only be allowed 45 minutes for lunch. Clerical contract states no less than 30 minutes for meal breaks, two 15 minute rest periods. Member works flextime (starts at 7:30 am to 3pm) and is paid for 7 hrs/day. 7-15:00 hr contract allowed 15 min. break in morning. The member saves 15 min break to combine with lunch, therefore 1 hour lunch break

b) Filed a grievance on meal breaks, flex time after investigating with head nurse.

c) Lost grievance. Sited operation requirements. No interference with flextime clause. Member never will grieve anything again

2. a) I work in the field of child protection which is very stressful. Often when female employees are pregnant they will be put off work early by their physician. In this particular case the pregnant employee had made it known to her supervisor that her physician was about to put her off work early. The employee's supervisor then coerced the employee into using her remaining vacation and her overtime to cover the time off rather than having her doctor put her off work.

b) I was unaware of this situation until a day or two before the employee was to leave. I did get an opportunity to speak to the employee, explain the contract, explain that she shouldn't be made to feel, by her supervisor, that she had to use her vacation and overtime. I tried to encourage and support my coworker.

c) Despite my actions the coworker used her vacation and overtime up to cover the time off prior to delivery. In retrospect, I feel that if I had been made aware of the situation earlier and been present for some of the discussions with her supervisor the outcome may have been different.

3. a) A worker in a probationary position was terminated for a poor performance. She had been spoken to at regular intervals with goals set and deadlines given for improvement. She failed to reach any goals by the given deadlines. She was given extra time with one-on-one supervision to help her with her problems. She maintained a negative attitude. When she was terminated, she applied to the union for support.

b) A grievance was filed and carried to 3rd level.

c) The termination was upheld. The supervisor had documented the meetings, goals set, deadlines given. The worker had signed her agreement to meet these goals by these deadlines. The worker had failed to document incidents in her favour as had been suggested to her both by her supervisor and steward. She had shown no improvement in problem areas which were hazardous to the health of others.

4. a) In my work area the employees felt that they were classified incorrectly and should be upgraded from a CLII to a CLIII position. After directly requesting the change from the department, as required under the contract, and being refused, they came to see me.

b) After receiving the departmental refusal I began the process of reclassification appeal. Working the ERO, we accumulated job descriptions that closely resembled ours, but that were CLIII classification. We also contacted employees from our work area to be witnesses at the appeal tribunal.

c) We presented a great case at the tribunal hearing but unfortunately the board felt that although we should be higher than we were we were not at the CLIII level.

5. a) An employee was placed in an unsuitable position by the C.S.C. from layoff list. He apparently met the minimum (?) requirements for the job. To me it seemed he only met the grade level requirement. He performed poorly in the job, even with some training.

b) Had many meetings with local president and ERO to discuss this issue. Also met with HRD at workplace who had consulted C.S.C. Discussed options with the employee and the possibility of being put back on the layoff list.

c) No clear article coverage (safeguard) for employees to be fully retrained for the new position. Employee laid off and reinstated to the layoff list.

EXECUTIVE MEMBERS AND E.R.O.'s

EFFECTIVE (52-60)

1. -BACKGROUND: employer wanted to cut breaks from 15 minutes to 10,
-complaining if we did take a break, iron hand

situation: as steward, went in and talked about the problem with supervisor, there are contract issues, if you do not give us a 15 break that we are allowed by the collective agreement, we will

lodge a grievance. You know that we are entitled to it, we will do our best not to abuse it, you must allow us, and we will do our best to make sure the office is not left unmanned. because that was his concern. We talked about it. He wasn't very receptive at first but as we discussed it, and we were willing to make sure that our job was being done but he had to live up to the contract and eventually it came to an understanding.

outcome: He said fine, if you'll do it that way then I'll live up to my end, and it worked well

-addressed the issue on site

-talked to the supervisor; his worry was productivity

-believe that it is in the approach of the steward; to be personable, polite yet straightforward

2. background: NS hospital, cook was searched by security firm that was hired by the hospital steward contacted employer, met with employer, filed a grievance and before long had a written apology from employer. The steward took the initiative, followed it right through and successfully resolved the situation.

3. eg. employee was called up because of absenteeism and would have been disciplined. The steward talked to the employee in question and warned him of the possible consequences, thus resolving the situation and avoiding the suspension of the employee.

4. background: grievance in a county schoolboard where people other than bargaining unit people were coming in prior to the opening in Sept. and doing work eg. teachers, volunteers, guidance counsellors

steward put in a policy grievance so that it would stop, by all these people coming in our members were denied the opportunity to come in and made for a lot of confusion in Sept. things were not done or done incorrectly. Shop steward and president of the local negotiated a settlement. very effective

5. The same local had a situation where the member was denied vacation time. In this local get vacation by seniority, unless there's a valid reason why the time cannot be given to you. Her time was denied. It was a steward. She wrote up the first level of the grievance but it was settled at the first level because she knew what she was doing and there was no basis for denial.

6. background: office was under renovation; wall torn out canvas up etc., concrete and brick laying around. The steward almost to the embarrassment of other workers pushed the employer

under the occupational health and safety act, even though the steward was not pushed by her members, took action, contacted the dept. of labour. The employer was quite happy letting employees work in dust, noise etc. steward saw violation of rights and acted, was not intimidated by supervisors, did the right thing

7. steward investigates the concern, determine whether or not it's a grievance, let me know, file the grievance and send me written remarks on what has happened which are very helpful

-there have been situations where the steward has gotten involved and resolved the situation before it got to a grievance stage. Many times the griever is in the same workplace as the steward, and the steward knows the personalities involved, whereas I don't

e.g. doing something to worker, violating the contract, the steward informs them of this and states that if not corrected a grievance will be filed. A lot of times it can be resolved, and that's the way it should work. Many times a grievance is just a misunderstanding between the employee and the employer, that gets out of hand after a while.

-the first stage of any grievance is to meet with the employer informally if not resolved, then step 1 the written form for grievance takes place

8. background: dept of health, 25 employees disciplined because of their use of sick time

I initiated the grievances but didn't process them. I set up a meeting specifically to deal with the issue, brought all the players that were involved, got all the background info. arranged for head office to have an ERO present, where we could review the letters, a lot of legwork, getting the paperwork done.

there's a provision in our contract for a modified workweek. Upon the request of 4 clerical employees, I acted to get a modified workweek in place .

There was a lot of work. I participated with them to write up what we thought the principles of a modified workweek were and how it should work, did a bit of research, and that was the basis of an agreement that is pretty well in place. I met with mgt. set up meetings with the immediate administrator, and the Health unit, had discussions, had to provide background, advantages and had to be able to present the case. In order to get a test case going we had to prove it had advantages; reduced sick time, improved morale, increased service to the public on the days that people were working, had to sell the case.

Beyond that had to participate in working out hours and days for people, and the evaluation of it. In the Dept. of Health it is in place province wide.

others: serving grievances; going and trying to resolve it by discussion before it came to any paperwork

9. stewards have gotten people full time jobs, under the collective agreement casual employees

would have not known they were entitled to, and have been successful in getting the employer to hire them full time

- they leap in at the first sign of injustice and correct it
- just by making the initial move, starts the ball rolling
- steward handled the situation right on the spot, avoiding grievances
- others have broken up fights

Ineffective examples (61-64)

1. there in body only; cases where stewards have been noneffective or ineffective in their job the grievance has gone to the third level and been handed over to me

2. times where stewards have misunderstood the collective agreement and started things rolling when there was no grounds for them in the long run but I don't have a problem with that because the person is taking the initiative to try to do something. I wouldn't say it's as much ineffective as unfortunate.

3. -in some cases the stewards have told the member they didn't have a grievance and should go back to work and not be so petty. The person would call me and in fact it was a violation of the contract and indeed a grievance.

there are some stewards that feel its going to get them someplace in the workplace with the employer although we all know that's not the case.

4. many occasions inaccurate information is given which meant that the individual lost their rights under the agreement to hear their complaint heard because of the timeframe, too late e.g. people have been disciplined up to suspension, when it is questionable whether the discipline needed to go that far