

## **Guidelines and Principles for Optometry Unit Members Who Serve as Local 20 Representatives to Labor-Management Committees**

1. **Treat other people with respect.** The Union treats all people with respect, and fosters a productive environment free of unlawful harassment, intimidation and discrimination.
2. **Never make agreements with management alone, always involve your field reps.** You can't be a union if you are by yourself. We should always try to make sure that when we are in discussions with management, there is at least one other union member or a union staff member present. This helps build the presence of the union, it allows us to show unity and it gives more union brainpower to come up with ideas and evaluate actions.
3. **Represent the best interests of the Union.** People acting on the Union's behalf should aim to advance the Union's legitimate interests, and should never do anything that could bring the Union, including its staff and elected leadership, into disrepute.
4. **When in joint meetings, stick to the union agenda. If you are not sure what the union agenda is or how to respond to something that management is saying, call a caucus or wait until the next break.** It is important that the union act together when dealing with management. This means that significant disagreements should be saved for caucus rather than being aired in front of management. It also means that the union agenda should be aggressively pursued by everyone and that if the discussion moves to something that the union is not prepared for, a caucus should be called or the issue should be tabled. This does not preclude the airing of ideas while "brainstorming" together with management, as long as it is clear that the ideas under discussion are not formal union positions or proposals.
5. **When in caucus, talk about all your hesitations, concerns, etc.** While it is important to work together when in meetings with management, it is equally important that any disagreements be aired in caucus. If your caucus cannot reach agreement, the issues should be tabled until there could be more union discussions of the issues. People should feel free to raise issues and concerns in caucus. In fact, they should see it as their responsibility. This is the only way to build unity of action.
6. **Evaluate all proposals and ideas for their impact on all members and on the union.** Members sit on committees as representatives of the Union. Ideas, proposals and activities should always be evaluated for their impact on the members and the union, in both the short and long term. This takes more time than simply looking at "how it affects me today" but it is critical to keeping the changes from having significant negative impacts. A good evaluation can rarely be done by a single person – it needs different points of view to be thorough.
7. **Report to the union on all discussions, meetings, teams, etc.** The union cannot act in a unified manner if it doesn't know what is going on. It is very common for labor-management activities to multiply in a way that makes it difficult for the union to keep on top of them. It is therefore important that all union participants communicate with other union members and with the union staff responsible for their facility about what is going on in their particular group. This is important because what is happening in your area may impact other facilities or areas.

8. **Communication and transparency are essential to the success of the Union.** Don't keep secrets with management. One of the "principles" of many involvement programs and some forms of consensus decision-making is that the content of discussions (and particularly any disagreements) stay within the group. Full and open communication, transparency and discussion with other members and union staff are the only way to keep things on the Union track.
9. **Do not be involved in direct or indirect discipline of other members.** There are many ways, besides the formal discipline procedure, for members to be involved in disciplining other members. Peer pressure can be created around issues that are essentially the employer's concerns. This will create divisions within the union. Discipline is a management job. Your job is to represent your co-workers.
10. **Unity.** It cannot be emphasized enough that building unity with other union members (within and outside the committees) must always be on the minds of any participants in labor-management programs.
11. **Take good notes.** The union needs a record of what goes on in all joint meetings in order to coordinate across committees, to keep track of management's activities and to have a paper trail in case the union needs to use its legal rights as the sole collective bargaining agent. Make sure minutes are sent to the necessary parties.
12. **Respect Confidentiality.** People acting on the Union's behalf must respect and maintain the confidentiality of sensitive information they have gained due to their association with the Union. This may include personal information about members, union officers, union staff, and/or information about the internal workings of the Union or its partners or suppliers.

Local 20 members should abide by all of these guidelines and principles in their capacity as Local 20 representatives to labor-management committees.

Failure to comply with these guidelines and principles may be the basis for removing a member who is serving as a Local 20 representative. A member may appeal to the Unit Board.

Adopted by Optometry Unit Board on November 17, 2014