

## STEWARD ROLES

### COMPETENCY ASSESSMENT PLANNING & EVALUATION (CAPE) SELF-ASSESSMENT TOOL FOR BCNU STEWARDS

NAME: \_\_\_\_\_

DATE OF INITIAL SELF-ASSESSMENT: \_\_\_\_\_

#### INTRODUCTION

Competency develops over time – each steward’s development is unique and will progress according to their learning needs, initiative, education, and experience. Competencies are a description of the combined skills, experience, attitudes, and traits that a person draws upon in order to do well at the specific work their job or role involves. New stewards are not expected to be highly competent in all the areas described below when they enter the role. What is essential is that all stewards possess a willingness and desire to learn and grow in these key areas – through education, teamwork and experience doing the work.

#### PURPOSE

- Provides a description of BCNU steward competencies.
- Guides self-assessment of competency levels.
- Provides a means for identifying gaps in knowledge and learning needs.
- Directs the planning of learning strategies to meet their personal learning needs in specific areas.

#### FREQUENCY OF COMPLETION

- New stewards should complete the [New Steward Skills Development - Checklist STR030](#) before attempting completion of this self-assessment.
- It is recommended that stewards should complete this self-assessment tool every six months.
- Participants in the Steward Intermediate and Steward Advanced courses will be required to complete the assessment at the beginning of the course and at the end of the course to guide their learning.

#### INSTRUCTIONS

- 1. Review the entire document.** Familiarize yourself with the competency levels and description (scoring guide) as well as the competency statements (criteria that you will be evaluating yourself against).
- 2. Assess your current level of competency.** You will consider various aspects of your role by reviewing all the categories on the CAPE tool.
- 3. Evaluate your level of practice in all the categories of the competency statement.** You may require knowledge and practice to become competent in some of the categories, you may already be competent, and/or there may be competencies that you already perform at the proficient or expert level.
- 4. Record your Competency Level** on the tool using a scale of 1-5 based on the definitions below.

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5. **Identify your learning needs.** Highlight the competencies you wish to receive more experience performing.
6. **Begin to plan your learning** for your professional development. Remember to use the [Steward Resource Toolkit](#) for resources to assist you with your learning.
7. **Review this plan with your mentor** so that they can guide and support your progress.

To complete the following document, use the definitions below adapted from *“From Novice to Expert, Excellence and Power in Clinical Nursing Practice”* (Benner, P. 1984) to determine your current competency level for each statement:

COMPETENCY LEVEL	DESCRIPTION
1. Novice	<ul style="list-style-type: none"> <li>&gt; I have only textbook or limited knowledge of this skill or practice.</li> <li>&gt; I need instruction and guidance to complete it.</li> <li>&gt; I may lack experience in context and be unaware of resources.</li> </ul>
2. Advanced Beginner	<ul style="list-style-type: none"> <li>&gt; I have a working knowledge of most aspects of this skill or practice.</li> <li>&gt; I can complete most of it using my own judgment, but still need some guidance with unexpected situations.</li> <li>&gt; Able to make simple decisions</li> </ul>
3. Competent	<ul style="list-style-type: none"> <li>&gt; I have a good working knowledge of this skill or practice.</li> <li>&gt; I can complete most of it using my own judgment, but still need some guidance with unexpected situations.</li> <li>&gt; I have confidence in my decision making.</li> </ul>
4. Proficient	<ul style="list-style-type: none"> <li>&gt; I have well-developed knowledge and experience of this skill or practice.</li> <li>&gt; I can predict and adapt my practice across multiple complex situations.</li> <li>&gt; Analytical approach to decision making, confidence in my assessment findings.</li> </ul>
5. Expert	<ul style="list-style-type: none"> <li>&gt; I have a deep understanding of and refinements of this skill or practice.</li> <li>&gt; I can predict and adapt my practice across multiple complex situations.</li> </ul>

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#### BCNU STEWARD COMPETENCIES

Adapted from the BC Nurses' Union Steward Resource Toolkit: [Steward Competencies STR010](#)

Competency Statement	Date of Assessment					Learning Strategies and Accomplishments (Include date with each entry)
	DATE	DATE	DATE	DATE	DATE	
	Competency Level					
<b>1. LEADERSHIP: Stewards use leadership to motivate themselves and others, build trusting relationships and maintain a positive attitude in challenging circumstances.</b>						
1.1 Practice self-awareness by being adept at examining personal emotional triggers, assumptions, biases, values, principles, strengths and limitations.						
1.2 Apply self-awareness to managing behaviours and interactions with others.						
1.3 Engage others through relationship building, personal influence, teamwork, communication and role-modeling.						
1.4 Stewards pay active attention to the overall health and well-being of the membership at their worksite through active member engagement (e.g., walkabouts).						
1.5 Operate with an understanding that they are the face of the union at the worksite.						
1.6 Actively support the goals and positions of the organization, and work to enhance BCNU's positive reputation with members and others, at the worksite and beyond.						
1.7 Able to draw on various skills, abilities and tools in responding to conflicts arising from differences in viewpoints, priorities, values, desires and needs.						

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Competency Statement	Date of Assessment					Learning Strategies and Accomplishments (Include date with each entry)
	DATE	DATE	DATE	DATE	DATE	
	Competency Level					
<b>2. COMMUNICATION: Stewards are comfortable using a broad range of communication styles, and choose appropriate, effective ways to communicate to different audiences in diverse situations.</b>						
2.1 Aware of own communication style and observant of the styles and needs of those engaging with, as well as seeking input and feedback from others to strengthen exchanges.						
2.2 Communicate information, thoughts and ideas clearly in different contexts to different stakeholders.						
2.3 Deliver information through a variety of different media and forms, selecting the one that best supports their goals and parameters.						
2.4 Convey information and ideas in a clear and timely manner.						
2.5 Listen carefully and work to ensure understanding of what others are saying, thinking, and feeling.						
2.6 Written communication is in a clear, concise, organized and convincing manner for the intended audience.						

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Competency Statement	Date of Assessment					Learning Strategies and Accomplishments (Include date with each entry)
	DATE	DATE	DATE	DATE	DATE	
	Competency Level					
<b>3. LABOUR RELATIONS: Stewards take a proactive approach advocating for their members through formal and informal channels. They guide members through the collective agreement dispute resolution process and other collective agreement processes (e.g. PR Process, DTAs) - from initial assessment of the issue(s) through to identification and implementation of solutions.</b>						
3.1 Proactively work and advocate for just and healthy workplaces through formal and informal channels.						
3.2 Attempt to resolve workplace issues in a collaborative manner that is “hard on the problem, not on the person”.						
3.3 Ability to assist members through and explain the various dispute resolution processes of the collective agreement.						
3.4 Understand their role and legal responsibilities as union representatives which includes the Duty of Fair Representation (Section 12 of the BC Labour Code).						
3.5 Make clear, informed and well-documented decisions, including when to refer a matter on to an LRO or other staff.						
3.6 Ensure that issues receive timely attention, and are tracked and followed-up, through effective file management and communication with members.						
3.7 Utilize Union Management Meetings (UMM) to bring forward potential issues to management to have them addressed proactively.						

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Competency Statement	Date of Assessment					Learning Strategies and Accomplishments (Include date with each entry)
	DATE	DATE	DATE	DATE	DATE	
	Competency Level					
3.8 Familiar with how to read and interpret collective agreement language, and other supporting documentation (e.g. employer policies).						
3.9 Know where and how to access the information and support they need to conduct their labour relations work thoroughly.						
3.10 Carefully examine presenting issues and problems, probe for related issues and think strategically about potential outcomes and best courses of action.						
3.11 Form opinions and make decisions through investigative research, critical analysis of information and the careful testing of assumptions and facts.						
3.12 Purposefully build connections, partnerships and networks to create results, as it is essential to strong labour relations practice and the building of an engaged membership at the worksite.						
3.13 Develop and create systems that support the effective and efficient completion of work (organizational skills).						

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	DATE	DATE	DATE	DATE	DATE	
	Competency Level					
<b>4. ADVANCED LABOUR RELATIONS: Stewards analyze, implement and integrate these advanced labour relations knowledge &amp; skills into their practice.</b>						
4.1 Acts as an effective support to members during employer investigation and respectful workplace investigation meetings.						
4.2 Acts as an effective support and resource to members required to undertake a learning plan.						
4.3 Familiar with the principles of progressive discipline and relevant case law (Wm. Scott, Edith Cavell, KVP, Hilton Villa).						
4.4 Familiar with and utilizes the principles of procedural fairness and natural justice when assessing discipline that has been imposed.						
4.5 Conducts effective and thorough investigations with the employer and members, utilizing the principles of investigation: Neutrality, Fairness, Thoroughness & Timelines.						
4.6 Recognizes and requests appropriate documentation and evidence related to the potential grievance.						
4.7 Scrutinizes and identifies any gaps that are present in an investigation.						