
Balanced Scorecard Report 2005

Newfoundland & Labrador Nurses' Union
2005 Balanced Scorecard Report

The Newfoundland and Labrador Nurses’ Union (NLNU) represents more than 5,000 Registered Nurses working in acute care, long-term care, community, education and research. Led by nurses and inspired by nurses, the NLNU works to protect your rights, to ensure fair and equitable working conditions, to advocate for the delivery of high quality health care and to promote a publicly funded, publicly delivered health care system.

**OUR VISION:** The Newfoundland and Labrador Nurses’ Union:

- Is a membership driven, proactive and democratic Union, sensitive and responsive to ever changing needs in an evolving health care system;
- Maintains mutual trust, respect, support and understanding while valuing diversity and creativity;
- Is dedicated to providing an environment conducive to participation, learning and personal growth;
- Advocates for a high quality, publicly funded health care system in partnership with the public, communities and health care professionals.

**OUR OBJECTIVES:** As a union, the NLNU’s primary objectives are:

- The advancement of the social, economic and general welfare of its members.
- The promotion of the education of its members in all matters relating to their social and economic welfare.
- The promotion of the highest standards of health care.
- The promotion of unity within the nursing profession and other allied fields through cooperation with and support of other organizations sharing these objectives.

Our Strategic Balanced Approach

We exist to serve our membership and its broad array of needs. To do this properly requires taking a balanced approach when making decisions, facing challenges and capitalizing upon opportunities – particularly in the fast-paced, highly demanding world of health care.

In an effort to achieve this balance, the NLNU is guided by a three-year strategic plan. As part of our 2004-2006 strategic plan, we set out to ensure an efficient, effective and responsive organizational structure that could more adequately meet our members’ needs. We knew this meant change and we knew we required external support in the change process. As such, we commenced the 2004 Organizational Review with blindSpot Business Consulting Inc.

As a result of the Organizational Review recommendations, we have begun utilizing a business tool commonly referred to as the Balanced Scorecard. We have taken that tool, modified it to meet our needs and are using it to measure our progress to increase our accountability to you, our members.

We have worked hard at identifying areas where we feel we need to take affirmative action and have set targets that will let us know whether or not we have achieved our goals. The changes we are striving for will take place over a number of years, evolving the organization. Some actions are needed sooner rather than later, so you will notice that our targets have been set according to what we realistically think we can achieve, and within what timeframe.

Where possible we used benchmark data from previous surveys and records to establish our targets. You will also notice, however, that in some cases we had to estimate what was achievable as there was no precedent data to guide us. We are breaking new ground.
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As we move forward and measure our achievements, year after year, we will gain greater knowledge. In turn, that knowledge will help us to adjust our targets accordingly.

In order to achieve our Balanced Scorecard targets, we have developed a four-phase plan – think of it as a care plan for the NLNU. Each of the four phases corresponds with a Strategic Theme and under each theme we have created eight Strategic Initiatives:

**Stabilize the Patient:**
1. Revitalize Communications
2. Realign Functions and Workload

**Determine the Outcomes:**
3. Establish St. John’s and Area as a Symbol Region
4. Establish Performance Management

**Monitor Vitals and Adjust the Plan:**
5. Connect and Collaborate
6. Increase Education

**Commence Recovery:**
7. Exploit External Supporting Resources
8. Exploit Technology

We have started to identify and execute projects to support these themes and initiatives; in many cases we have been very ambitious in our efforts. All of our projects have measurable outcomes to ensure we know we have achieved what we set out to do.

Two of the actions that will ensure our success over the long-term are the addition of an Office Manager and a Communications Specialist to the provincial office staff. Marina Owens assumed the role of Office Manager and is key in improving our Balanced Scorecard data collection and analysis, while Colleen O’Leary, as Communications Specialist, is instrumental in improving our membership and staff connections.

We have been very fortunate to have the continued effort of your NLNU Board of Directors, Branch Presidents, Renewal Team, staff and other local representatives to carry out a great deal of this work.

This is our very first Balanced Scorecard report on the measured successes carried out in the past fiscal year, ending July 31, 2005. As we continue to strive for excellence and report back to you, year upon year, we hope our openness and accountability will be demonstrated.
Our Balanced Scorecard strives to create a measurable means of determining our success in meeting member needs. In servicing our members and operating the organization, we have identified five areas, called Perspectives, where all of our efforts are focused:

**CHAMPION NURSES’ NEEDS:** We exist to meet the needs of you, the nurse, and how you think we are achieving that is vital.

**EXCEL AT SERVICE:** We are constantly striving to provide the best services in the best possible way.

**ADVOCATE HEALTH CARE:** Our ability to influence critical issues in health care is part of our mission.

**MOTIVATED, KNOWLEDGABLE, CLIENT-FOCUSED STAFF:** As an employer, we must treat our staff the way we expect our members to be treated in their workplace.

**FINANCIALLY STABLE AND SUSTAINABLE:** We must be constantly diligent in the stewardship of our members’ dues.

As a result of numerous discussions with our Board of Directors and other NLNU representatives, our Scorecard now has a series of measurable targets, called Key Performance Indicators (KPIs), to help us focus our efforts. These measures and our achievements to date are proudly presented in this, our first Balanced Scorecard report.

**Perspective:**

**Champion Nurses’ Needs**

“How must we appear to our members?”

**KPI: OVERALL SATISFACTION** In 2001, we undertook an extensive survey of our membership, which provided data on your satisfaction with the NLNU at that time. As we always strive to improve your opinion of us, we set targets in our Scorecard for the next 4 years to improve the 2001 overall satisfaction level rating of 3.45.

<table>
<thead>
<tr>
<th>Year</th>
<th>Actual</th>
<th>Goal</th>
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<tbody>
<tr>
<td>Jul 31, 2006</td>
<td>3.40</td>
<td>4.00</td>
</tr>
<tr>
<td>Jul 31, 2007</td>
<td>3.50</td>
<td>4.00</td>
</tr>
<tr>
<td>Jul 31, 2008</td>
<td>3.60</td>
<td>4.00</td>
</tr>
</tbody>
</table>

**Goal:** “To increase the overall Union performance rating by members to 4.0 out of 5.0, from a benchmark of 3.45, within 48 months.”
Over the last year, we have undertaken a number of initiatives that were focused on you, our member.

Some of these initiatives are a new way of working for our organization. A new way of planning and conducting our day-to-day activities, of measuring our achievements and of communicating with you.

Our recent membership survey showed your satisfaction score increased from 3.45 to 3.7 (out of 5). This tells us we are improving and are on track, though it also tells us we must continue our efforts to improve.

Again using the 2001 survey data, 52% of members rated the NLNU’s performance as ‘high’ at that time. In an effort to continuously improve, we set targets for the next four years, striving for an 80% rating in 2008.

We are already seeing positive results. In this year’s survey, 67% of nurses gave the Union a rating of 4 or 5, exceeding our 2005 target of 65%. It is also encouraging to report that an additional 28% of nurses gave the Union a rating of 3 out of 5.

KPI: MEMBER PARTICIPATION We know, as a volunteer grassroots organization, a union’s strength is in the collective participation of its members. One way we are measuring the Union’s relevance to you, the nurse, is by your level of involvement in NLNU activities.

Again using the 2001 survey data, 52% of members rated the NLNU’s performance as ‘high’ at that time. In an effort to continuously improve, we set targets for the next four years, striving for an 80% rating in 2008.

We have heard a lot from our local representatives concerning how you feel about your Union in your workplace. We will continue to work towards being relevant to and involving you in every NLNU event we conduct.
Until we reviewed the results of the recent membership survey, we did not have a true picture of member participation at NLNU meetings. Based on our survey, 51% of members attended at least one meeting during the year. We have now set targets to monitor an increase in that participation. This measure will be one indication that we are doing the right things to make the NLNU more relevant to you.

The shop steward is a key role in any union. They are your personal representatives to help you resolve issues with your employer at the work unit level.

We surveyed our Branches and discovered that 83% of our shop steward roles are filled.

We need our shop stewards in place to help us build a better union. Measuring our vacancies across the Union has told us we must better understand why some roles remain vacant and work diligently to fill them.

In taking on any NLNU role, you cannot be effective to the organization unless you actively participate.

We surveyed our Branches to find out where we have active representation and what is required to support our frontline representatives.

Based on this survey, we found that currently, 70% of shop stewards ‘agree’ or ‘strongly agree’ they are active in their shop steward role. While some of these shop stewards may have very few workplace issues to deal with, 52% have represented a nurse in a meeting or grievance within the last year.
MyNLNU, our members-only website, is one of the exciting new initiatives we have implemented to communicate with you and encourage your participation in the Union.

As of June 30, 2005, of over 5,000 nurses in our Union, we had 423 of our members registered and active on the website, representing about 8% of our membership.

While we may have been optimistic with our initial target of 25%, feedback from current users has convinced us that the website is a worthwhile and effective means of connecting with our members.

Perspective:
Excel at Service

“At what services must we excel?”

KPI: GRIEVANCE RESOLUTION Helping resolve workplace issues continues to be a major focus of our service to members. We have acknowledged that our whole organization must improve the efficiency of processing grievances.

We have taken positive steps to address this essential service by examining how we process and successfully resolve workplace issues. The critical data comes from our Grievance Tracking System and the Labour Relations Officers (LROs) themselves, who have begun recording their activities.

We have also realigned our LROs to specific geographic regions, working to have dedicated resources throughout the province. As a result, the LROs will gain a great depth of local knowledge in working with specific employers and Branch representatives and we are able to know that we are working diligently and equitably on all our members’ grievances.
When establishing this goal, we polled other unions to determine what an appropriate target would be. We found that, by just setting targets, we are again on the leading edge.

We set an aggressive target of 30% based on an estimate of what we thought would be achievable this year. We were actually able to resolve 21% of grievances within 12 months of filing.

While we came in under our projected 30% target, we partially attribute this to our success in resolving outstanding older grievances. The 2004 Organizational Review recommended we spend more time focusing on grievances that had been open for a number of years. As a result, our LROs spent a great deal of time in 2005 investigating and closing older grievances. We had set a target to close 10% of older grievances per year and last year we actually resolved just over 20% of grievances filed before August 1, 2004.

KPI: RESOURCE ALLOCATION BY REGION
It is imperative to us that we equitably represent all our members through our efforts at provincial office.

Goal: “To distribute the percentage of LRO hours worked equitably by site and activity, within a variance of 10%.”

With no formal data on record, we have just implemented a valuable new time keeping system for our labour relations staff. We have spent a number of months testing and tweaking our timesheets to ensure we get the right information in the simplest way.

As of August 1, 2005, our LROs are documenting their time according to the type of work they do and for which Branch. With this system we are able to make sure the labour relations function is equitably distributed to all members. We look forward to reporting results to you next year on this measure.
KPI: EDUCATION

We strive to support our members with timely, relevant, quality education.

Our old approach to shop steward education was based upon requests from Branches. In 2003/2004 we held a significant number of education sessions across the province.

In 2004/2005, our focus was to provide education sessions in areas where we had not been able to offer one the previous year.

Although we only reached 67% of regions this past year, we have created a schedule for 2005/2006 that provides a focused and consistent approach to educating shop stewards.

In our membership survey, 67% of members told us the education program is meeting their needs.

Each session also provides opportunity for member feedback, enabling us to constantly adjust education to meet your needs.

We know we need to educate all of our new shop stewards as soon possible so they are supported in the workplace and are as effective as possible for you, and for all of us.
Previously, we had not tracked our effectiveness at reaching shop stewards within this timeframe. We have now put tracking mechanisms in place to determine how well we support this critical union resource and will report our findings to you next year.

**KPI: SERVICE EQUITY** We have identified a series of core services to our members, such as grievance resolution, advice, counselling and duty to accommodate. We are striving to balance the effort we provide to all of our core services so that all member needs are addressed.

**Goal:** “To ensure Labour Relations Officers’ time is appropriately distributed to support core Union services.”

The new LRO time keeping system will be a critical source of information for us as we adjust our efforts towards member services. As indicated previously, this is a new system we have been piloting and preliminary results are extremely revealing. It will take some time to gather data and analyze what we see before we can appropriately determine how our efforts need to be allocated.

Again, we look forward to reporting our results in the next Balanced Scorecard.

**KPI: EFFECTIVE COMMUNICATIONS** It is imperative that everyone in our organization, from our members to our staff, gets the information they need when they need it and that we provide as much opportunity for input as possible.

This goal focuses on achieving a rating of 4 or 5, on a scale of 1 to 5. You have high expectations of us and we have set high standards for ourselves to meet those expectations.

The 2004 Organizational Review pointed out the gaps in our communication processes, especially in member communication and we took immediate action.
Some of our communications efforts over the last year include the In Touch newsletter, the Clarity bulletin, the MyLNNU website, the Grievance and Arbitration Update and the New Member Handbook. Our efforts have gone a long way in improving our communications with you, reflected in the 69% of members who rate the effectiveness of our communications as ‘high’.

Our recent staff survey, however, has told us that only 33% of staff rate communication effectiveness as ‘high’, clearly indicating that we must balance our efforts between internal and external communication. As we move into 2006, we are examining ways to address the needs of our staff.

**KPI: COLLECTIVE BARGAINING SUCCESSES** The core of your employment relationship is your Collective Agreement. On your behalf, we negotiate terms based on the priorities you express to us. We naturally need to keep focused on our contractual achievements. Your vote, your voice, tells us whether we have adequately represented your view.

As a democratic organization, we need just 50% plus one of our members to carry any contract vote to acceptance. As a union, we strive for a higher acceptance rating from our members on a contract vote to indicate members’ satisfaction with our achievements.

As we negotiate our contracts over the coming months, we will measure the ‘Yes’ vote and report this measure in our next Balanced Scorecard.

**Goal:** "To obtain 80% ‘yes’ votes on all contract ratifications."

Information from the Association of Registered Nurses of Newfoundland and Labrador (ARNNL) helps us determine the status of nursing jobs. Over the past five years, the number of nurses employed in nursing in this province has increased from 5,431 to 5,548, an average increase of 0.53% per year.

We will continue to focus our advocacy efforts to maintain that growth and relay the ARNNL information annually.

**Goal:** "To maintain the historical growth in the number of Registered Nurses employed in the province."

**Perspective:**

**Advocate Health Care**

“What do we need to influence?”

**KPI: STAFFING LEVELS** As we strive to improve quality of care for our citizens, a critical measurement area is the number of nurses employed in health care in this province. Increasing the number of nursing positions remains one of the top priorities in all our communication and advocacy efforts.

Information from the Association of Registered Nurses of Newfoundland and Labrador (ARNNL) helps us determine the status of nursing jobs. Over the past five years, the number of nurses employed in nursing in this province has increased from 5,431 to 5,548, an average increase of 0.53% per year.

We will continue to focus our advocacy efforts to maintain that growth and relay the ARNNL information annually.

**Goal:** "To successfully negotiate improvements in 75% of the top priorities identified by nurses."

Through membership surveys and other opportunities for input, our negotiating teams identify members’ priorities and bargain to achieve improvements in them. While we have no benchmark to go by, our extensive experience in collective bargaining tells us that we have been successful in this area in the past.

We are now tracking this information and we will report to you on this measure in our next Balanced Scorecard.
**KPI: RN Employment Status** A critical link to the number of nurses employed in the province is the number of full-time positions and an important indicator to us is any growth in part-time and casual jobs across the province.

In 2002, the Canadian Nursing Advisory Committee issued a report, which recommended a ratio of 70:30, full-time:part-time/casual nurses across the country.

ARNNL reported that in 2005 there were 5,548 nurses, of which 3,965 were employed in full-time positions or approximately 72%.

We will continually monitor these staffing levels and, whenever we can, influence an increase in full-time permanent jobs.

**KPI: Public Satisfaction** As nurses, we care for the people of our province every day. As a union, the public’s perception of the work we do is important and maintaining public support is essential.

It is common knowledge that the public considers nursing to be one of the most trusted professions.

As such, how we represent you to the public is critical to us. In a recent survey we asked the public of Newfoundland and Labrador how they rated our performance on a scale of 1 to 5.

We discovered that 81% of the public were satisfied with the performance of the NNU.
KPI: OPPORTUNITY FOR INPUT  We work diligently and proactively with government and employer representatives to voice your priorities. It is imperative that the NLNU has strong working relationships with these groups, encouraging and nurturing a culture of progress and mutual respect. We report here some highlights from the past year.

GOVERNMENT:
• Meeting with the Premier and the Minister of Health and Community Services;
• Meetings with the Minister of Health and Community Services;
• Cabinet Reception with the NLNU Board of Directors;
• Meeting with the Minister of Finance at the Cabinet Reception.

EMPLOYERS:
• Joint meeting with all of the four new employers, the Deputy Minister of Health and Community Services and the NL Health Boards Association;
• Meeting with the Eastern Regional Integrated Health Authority (RIHA);
• Meeting with the Western RIHA;
• Meeting with the Central RIHA.

Although several attempts were made to arrange a meeting with the CEO for the Labrador/Grenfell RIHA, scheduling was an issue and no meeting has taken place to date. We are continuing our efforts to meet with this employer.

Of special note, in 2005 we launched our MHA Network, where nurses volunteered to be a MHA “Buddy”. The main objective of the Network is for Buddies to meet with their MHA twice per year to educate them on nursing and health-related issues. Our first blitz was held during Nursing Week on the topic of Health Human Resources and feedback indicated that the initiative was successful.

MEDIA, COMMITTEES, LOBBYING AND ADVOCACY:
• Spoke with Premier Williams during Premiers’ summit meetings;
• Advocacy efforts at Health Accord meetings in Ottawa in September 2004;
• Attended two federal MP Breakfasts sponsored by CFNU;
• Numerous media interviews on local, provincial and national issues;
• President represented NLNU on CFNU National Executive Board;
• Annual presentations to students at the three Schools of Nursing;
• President and Board of Directors met with Chief Nursing Officer;
• Participated in activities of Health Coalition of NL, including an MP lobby;
• Meetings with the ARNINL President and Executive Director;
• Participated on numerous committees including the Primary Health Care Advisory Council, the Provincial Nursing Network and the Pension Investment Committee.

Goal: “To meet with the Health Minister at least twice per year; and the Premier, the Finance Minister, the Labour Minister and employers at least once per year.”

Goal: “To take advantage of opportunities to participate in media interviews, committees, lobbying and advocacy.”
Perspective: Motivated, Knowledgeable, Client-Focused Staff

“How will we demonstrate equity and sustain improvement and alignment with organizational needs?”

KPI: NLNU STAFF SATISFACTION

Goal: “To have 90% of employees rate their overall satisfaction level with the NLNU as an employer as ‘high’, within 24 months.”

With high standards, we have set a target based on a satisfaction rating of 4 or 5, on a scale of 1 to 5. Sixty-seven percent of staff rated their satisfaction as ‘high’. As an employer, we are working on how we can continually improve the NLNU as a place to work.

In 2004/2005, our staff experienced a significant amount of change; likely more than had been implemented in many previous years. Recognizing that, we will work with our staff to determine their concerns and address them as efficiently and effectively as we can.

KPI: WORKLOAD EQUITY

In any organization, staff must feel that workload is distributed evenly and, as the 2004 Organization Review indicated, our staff are no different. Our new time keeping system will allow us to concretely determine the balance of workload and activities. As responsible employers, we will report on this measure in our next Scorecard.

KPI: TRAINING

Goal: “To ensure each employee attends a minimum of one training course per year.”

In any organization, staff must feel that workload is distributed evenly and, as the 2004 Organization Review indicated, our staff are no different. Our new time keeping system will allow us to concretely determine the balance of workload and activities. As responsible employers, we will report on this measure in our next Scorecard.
Our previous approach to training was rooted in immediate need. This is reflected in this year’s measure of 64%.

Our new approach to training ensures all staff have equitable professional development opportunities. A training schedule has been created enabling us to meet our 2006 targets.

**Perspective: Financially Stable and Sustainable**

“What will demonstrate responsible management of dues?”

**KPI: OPERATING EXPENSES**

*Goal:* “To maintain operating expenses at 30% or less of total budget.”

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<thead>
<tr>
<th>Expenses as a % of total budget</th>
<th>Jul 31, 2005</th>
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<tbody>
<tr>
<td>Actual</td>
<td>20%</td>
</tr>
<tr>
<td>Target</td>
<td>30%</td>
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With no historical data to go by and knowing other organizations were too dissimilar to compare financial breakdowns, we set a target of 30% or less of our total budget. This past year, 25% of your dues paid the NLNJU’s operating expenses.

As a result of examining our financial data in this way, our financial auditor will now be reporting our yearly audit to us using the financial breakdowns you see in this report.

**KPI: DUES TO SERVICES ALLOCATION**

*Goal:* “To maintain the percentage of dues income to expenses allocated to providing membership services at 70% or higher.”

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<thead>
<tr>
<th>% of dues allocated to nurses’ services</th>
<th>Jul 31, 2005</th>
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<tbody>
<tr>
<td>Actual</td>
<td>66%</td>
</tr>
<tr>
<td>Target</td>
<td>70%</td>
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It is important to us that you know where and how your dues are spent in serving you.

Service to our members is our priority, demonstrated by the fact that last year we spent 75% of our dues income in this area.

**FINANCIAL FOOTNOTES:** As we believe it is important for our members to understand the breakdown of finances at the NLNU, we are providing additional data for you. The following charts indicate how your dues are allocated within our primary areas of expenditure.

**Operating Expenses – Breakdown**

- Salaries & Benefits – 48%
- Professional Services – 5%
- Other – 5%
- Building – 16%
- Depreciation – 12%
- Repairs and Equipment Rental – 9%
- Office Supplies – 5%

**Membership Services – Breakdown**

- Membership Support & Advocacy – 52%
- NLNU Meetings & Conventions – 14%
- Professional Services – 3%
- Board of Directors & Committees – 7%
- Defence Fund Contributions – 6%
- Education and Communications – 12%
- Labour Affiliations/Conventions – 6%
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Membership Services – Support & Advocacy Breakdown

- Salaries & Benefits – Labour Relations – 48%
- Salaries & Benefits – Executive – 34%
- Travel – Staff – 4%
- Travel – Executive – 3%
- Branch President Support – 4%
- Arbitration & Mediation – 2%
- Branch Funds – 2%
- Donations – 1%
- Subscriptions – 1%
- Scholarships – 1%