

UTE Owner's Manual

A Guide to the Union of Taxation Employees

A word from UTE's National President

Welcome to the Union of Taxation Employees (UTE). Welcome to **YOUR UNION**. Why your union? Because you, along with the more than 24,000 other UTE members, own our union. As a rank-and-file UTE member, you are in the driver's seat. You steer the course of our union, through your local, regional and national representatives. Each UTE member has the full opportunity to participate in the activities and life of our union. Whether you do so, of course, is entirely up to you; but I urge you to get involved to the greatest extent possible. You will find an open, welcoming, membership-run union. An organization willing and able to give you greater control over the workplace issues that affect you personally.

The world grows more hectic; our lives more complicated. Working in the federal public service,

We hope that, as a UTE “owner”, you join other members in building an effective, responsive and progressive organization.

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Who we are....

We're the Union of Taxation Employees (UTE), representing more than **24,000** employees of Canada Revenue Agency. We exist to maintain and advance the workplace rights of our members – a big task in today's federal public service!

It's a job we take very seriously. The UTE believes in fostering a constructive relationship with Agency management. But, we're aggressive in protecting our members' interests – from the office floor to Parliament Hill.

As a progressive, innovative union, our vision extends into the future. At the same time, our roots go back more than half a century. In 1943, employees working for the then-Taxation Department first organized themselves into the Dominion Income Tax Staff Association. Then, as now, federal workers recognized that unionizing is the best insurance policy against unfair and unreasonable employer actions.

In 1966, with the advent of free collective bargaining in the federal public service, the UTE joined the Public Service Alliance of Canada (PSAC) as the “Taxation Component”. Our 1987 convention voted to adopt our current name. With the passage of the CCRA Act, we moved from a department of the federal public service to an agency. This Agency was proclaimed on

November 1, 1999. On December 12, 2003, the Canada Customs and Revenue Agency (CCRA) became the Canada Revenue Agency (CRA).

The Program Administration (PM) classification group represents the largest number of UTE members, working in such areas as Client Services, Assessment and Collections and Compliance Programs. The next largest group of our members belongs to the Clerical and Regulatory (CR) group. Their tasks include clerical and administrative support, enforcement of the Income Tax Act etc. assistance to clients and maintenance of taxpayers' files. Our union also represents members of the Administrative Services (AS), Data Processing (DA), Drafting and Illustration (DD), Engineering and Scientific Support (EG), Electronics (EL), General Labour and Trades (GL), General Services (GS), General Technical (GT), Information Services (IS), Management (MG-SPS), Office Equipment (OE), Organization and Methods (OM), Purchasing and Supply (PG), Printing Operations (PR) and Secretarial, Stenographic and Typing (ST) classification groups.

All of these groups are covered under one collective agreement (the Program and Administration Services agreement).

Three times a year a UTE newsletter is mailed directly to each member's home.

UTE headquarters sends out information packages to our Executive Council members and to each Local in a timely fashion. These contain bulletins, publications and information from a wide range of sources, including the UTE, the PSAC, the Canadian Labour Congress, Canada Revenue Agency, Treasury Board and the media.

The UTE has a web site (ute-sei.org) that has all of our bulletins, minutes of national meetings, a contact page that lists all of the Executive Council's email addresses and other up to date information. Members can secure timely access to any and all Ottawa National Office staff, from the National President on down. We use all our resources and make every effort to deal with your concerns.

A final word...

At the end of the day, the union is you! The UTE is committed to providing our members with the best service and representation. We need to hear your voice...for you to play your part and have your say. Contact a local representative to learn more about how YOUR UNION is working for you locally.

training on this new system of recourse are provided to representatives and members as principles, decisions and jurisprudence evolves.

■ Education Programs

The UTE has developed its own education courses in “Grievance Representation”, “Staffing and Recourse”, Harassment, “Appeals Representation” and “Developing Membership Activism” – five practical areas of everyday use to Local activists. Given several times a year on an “as needed” basis, these courses provide Local officers and stewards with the knowledge and skills to effectively represent their members. Other training courses are developed as needs are identified.

As a PSAC “component union”, the UTE is able to offer its members the full and impressive scope of Alliance education courses. These range from a single day’s seminar to a full week’s residential school. Topics are as varied as steward’s training, health and safety, human rights and political action.

■ Membership Communication

An informed membership is an empowered membership. That’s why the UTE makes every effort to keep its membership up-to-date on the major issues of the day. Bulletins are sent to all UTE Locals for distribution to their members.

Where we’re found

UTE members work in all Canada Revenue Agency offices across the country – from headquarters to service offices in small town Canada. We are a part of the fabric of community life – inside and outside working hours – from coast to coast!

Our members are the union. UTE representatives and services are never difficult to access. The “Local” is the heart of our union. All UTE members in good standing have the opportunity to democratically elect their Local Executive. The Executive comprises such “table officers” as President, Vice-President, Treasurer and Secretary. It also includes “stewards” to whom members in a particular area of their workplace can turn for assistance.

Each Local holds regular membership meetings, along with an annual general membership meeting where executive elections are held and the annual budget and constitutional changes are presented for adoption.

How we're structured...

The UTE is structured to ensure that our union is run the way it should be – from the bottom up.

■ Locals

The UTE is organized into 54 locals, from St. John's to Victoria. Each and every member has the opportunity to shape our union by becoming directly involved in determining its policies, strategies and directions.

■ Regional Vice-Presidents

Ten Regional Vice-Presidents (RVPs) serve as the link between UTE Locals and the National Officers.

The RVPs are distributed across the following regions:

Pacific

Vancouver, Burnaby Fraser, Surrey Taxation Centre, Penticton, Kelowna, Victoria, Northern BC & Yukon

■ Agency Staffing Recourse/ Appeals Representation

Since the proclamation of the CCRA on November 1, 1999, the CRA staffing is no longer governed by the Public Service Employment Act and appointments under the CRA's new staffing directives may no longer be appealed. We still, however, continue to represent our members under the Agency's Staffing Recourse system.

The UTE has trained appeals representatives in all regions of the country. These appeals representatives have access to an extensive record of past appeals decisions and decisions from the Federal Courts of Canada and the Supreme Court of Canada (jurisprudence) organized, categorized and maintained in our National Office. A UTE Labour Relations Officers, based in Ottawa, provides advice and assistance to UTE appeals representatives throughout Canada to ensure that only the strongest arguments are put forward on our members' behalf and to maintain the delicate balance between the rights of the individual and the collective rights of our members.

Additionally, with the change in recourse brought about through the Canada Customs and Revenue Agency Act and the subsequent CRA Directives on Staffing and Recourse, we still continue to represent our members under these new initiatives, especially during the Independent Third Party Review process. As well, direction, advice and

■ **Grievance Representation**

The collective agreement, or contract, negotiated between the union and the employer, along with other legislation, sets out the terms and conditions of work. Whenever a member believes that his or her workplace rights have been violated, the UTE works with that member to try and resolve the problem informally. If that effort fails, the union will assist the member in filing a formal written “grievance” to management.

Unless management accepts the member’s grievance and acts to remedy the problem, depending on the type of grievance, it may be processed through five distinct levels.

The UTE Local representatives in the specific workplace where the problem occurred normally handle first and/or second level grievances. Third level grievances are generally submitted to the Agency’s Assistant Commissioners. These grievances are put forward and argued by UTE RVPs. The UTE Labour Relations Officers, working out of our national headquarters, handle final level grievances.

Should the issue still not be resolved to the member’s satisfaction, the PSAC can decide on the merits of the case whether to take the grievance to a quasi-legal forum called “adjudication”, if applicable.

Rocky Mountains

Calgary, Edmonton, Lethbridge, Saskatoon

Prairie

Winnipeg, Winnipeg Taxation Centre, Regina

Southwestern Ontario

Windsor, London, Kitchener, Hamilton, St. Catharines

Northern and Eastern Ontario

Sudbury Taxation Centre, Thunder Bay, Belleville, Kingston, Peterborough

Greater Toronto

Toronto, Toronto East, Toronto West, North York, Barrie

National Capital

Ottawa Headquarters, Ottawa Taxation Centre, Ottawa TSO, Ottawa International Taxation Services Office, Policy and Planning

Montréal

Montréal, Laval, Sherbrooke, Montérégie South Shore, Rouyn-Noranda, Outaouais

Québec

Québec, Trois-Rivières, Shawinigan-South Taxation Centre, Chicoutimi, Jonquière Taxation Centre

Atlantic

St. John's Taxation Centre, St. John's, Halifax, Sydney, Charlottetown, Saint John, Bathurst, Moncton, Summerside.

■ **Executive Council**

The Executive Council comprises the National President, the First and Second National Vice-Presidents (NVPs) and the 10 Regional Vice-Presidents (RVPs).

The Executive Council meets at least four times annually to discuss any issues that arise between Triennial Conventions.

■ **Executive Committee**

The UTE Executive Committee, which meets at the call of the National President, normally deals with issues referred by the Executive Council.

The Executive Committee is composed of the following officers: The National President, the two NVPs and one RVP (who serves on a rotational basis). It may conduct the affairs of our union between Executive Council meetings.

Presidents and 2nd national vice-presidents sit on the National Strategy Committee with several key people from the PSAC. They also sit on the National Strategy Committee, which brings all PSAC bargaining tables together to ensure and synchronize all strategies, actions and support that the bargaining team needs for achieving the bargaining objectives.

Bargaining is a long, arduous process, yet the UTE is in favour of meetings that continue until there is agreement. Bargaining objectives include salary increases in addition to important interests such as job security and improving and/or maintaining working conditions previously gained in the collective agreement.

■ **Day to Day Activities**

There are thirteen (13) standing committees: Bargaining, By-laws, Staffing, Technological Change, Health and Safety, Equal Opportunities, Employees Assistance Program, Finance, Honors and Awards, Workforce Adjustment, Harassment, Communications and Political Action. They deal with issues of ongoing importance to UTE members. Members of these committees attend meetings with the employer, monitor compliance with our contract, and support the training and education of our members.

What we do...

Service to the membership is the UTE's prime reason to exist. Our union provides a wide range of services, available to each and every member, wherever they may work.

■ Bargaining

The Standing Bargaining Committee is responsible for calling for and collecting bargaining demands from the locals. The Committee must compile the bargaining demands and propose a program of demands, which is submitted to the PSAC.

The National Bargaining Committee selects, modifies, writes or composes bargaining demands using the demands obtained from the Standing Bargaining Committee / locals. The Committee prioritizes all bargaining demands and submits them to the PSAC Collective Bargaining Branch within the established time frame. These bargaining demands are the UTE's official demands.

Members of the UTE bargaining team, jointly with the PSAC, represent and defend UTE members' interests at bargaining meetings with employer representatives.

■ National Officers

The National President is elected every three years by Local delegates to the UTE's national convention.

The National President is closely assisted by two National Officers: the First and Second National Vice-Presidents (NVPs). The First National Vice-President is assigned the responsibility for finance and the Second National Vice-President is assigned collective bargaining.

■ Standing National Committees

There are 13 Standing Committees that deal with issues of ongoing importance to UTE members. They are:

- Bargaining
- By-laws
- Communications
- Employee Assistance Program
- Equal Opportunities
- Finance
- Harassment
- Health and Safety
- Honours and Awards
- Political Action
- Staffing
- Technological Change
- Workforce Adjustment

Standing Committees are usually made up of at least two Executive Council members, a Staff technical advisor and one or two Local members elected every two years at the September meeting, of the twice-yearly National Presidents' Conference.

■ **Convention**

Convention is the governing body of the UTE. For the purpose of representation at a Convention, each Local is entitled to one (1) delegate with full voting rights for each block of two hundred (200) members in good standing or fraction of this number during the calendar year preceding the Convention. Every delegate must be a member in good standing of the local. These delegates elect and provide direction to the elected national officers.

Convention decisions are binding. This is when UTE By-Laws and Regulations are adopted, modified or rescinded and it is when the union's administrative budget is adopted. Convention occurs every three years.

■ **Presidents' Conference**

Two Presidents' Conferences are held each year, in March and September. Each Local is represented by one delegate, normally (but not

always) the President. Many Locals also send observers at their own expense.

The Presidents' Conference is not a decision-making body. Resolutions adopted at the Conference are referred to the Executive Council for consideration and action. Members of the Executive Council attend the Conference as facilitators/observers.

There is a high educational content to Presidents' Conferences, with much time given over to workshops, seminars and reports from Standing Committees. An opportunity is also provided to discuss resolutions brought forward by Locals as well as issues of general interest and importance to the membership.

■ **Regional and Inter-Regional Conferences**

Each RVP is allocated funds to hold Regional or Inter-Regional Conferences on issues or common concerns of UTE members in their geographic part of the country. These conferences provide another opportunity for UTE activists to participate in the work of their union. Each Region is also allocated a portion of the National Education Budget to help it hold educational courses.