

(Updated December 2008)

REGULATION NO. 1

1.1 STRUCTURE

- (1) For the purpose of By-law 7, the following localities are prescribed:
- (a) Atlantic Region; comprised of the St. John's, Charlottetown, Sydney, Saint John, Halifax, Bathurst, Moncton, St. John's Taxation Centre and Summerside Locals;
 - (b) Québec Region; comprised of Québec, Trois-Rivières, Shawinigan-South, Chicoutimi and the Jonquière Taxation Centre Locals;
 - (c) Montréal Region; comprised of Montréal, Rouyn-Noranda, Montérégie South Shore, Sherbrooke, Laval and Outaouais Locals;
 - (d) National Capital Region; comprised of Ottawa Headquarters, Ottawa Taxation Centre, Ottawa TSO, International TSO and Policy and Planning Locals;
 - (e) Northern and Eastern Ontario Region; comprised of Belleville, Kingston, Peterborough, Sudbury and Thunder Bay Locals;
 - (f) Southwestern Ontario Region; comprised of Windsor, London, Kitchener, Hamilton and St. Catharines Locals;
 - (g) Greater Toronto Region; comprised of Toronto, North York, Toronto East, Toronto West and Barrie Locals;
 - (h) Prairie Region; comprised of Winnipeg, Regina, the Winnipeg Taxation Centre and the Winnipeg Compensation Client Service Centre (CCSC) Locals;
 - (i) Rocky Mountains Region; comprised of Calgary, Edmonton, Saskatoon and Lethbridge Locals;
 - (j) Pacific Region; comprised of Vancouver, Penticton, Victoria, Burnaby Fraser, Surrey, Northern B.C. & Yukon and Kelowna Locals.

Adopted November 1966	Amended September 1994	Amended June 2005
Amended February 1977	Amended June 1995	Amended Dec. 2005
Amended September 1978	Amended December 1996	Amended March 2006
Amended August 1981	Amended March 1997	Amended Dec. 2006
Amended March 1982	Amended March 1997	
Amended July 1984	Amended September 1997	
Amended July 1987	Amended June 1998	
Amended September 1987	Amended July 1999	
Amended September 1989	Amended September 1999	
Amended December 1989	Amended June 2000	
Amended December 1990	Amended September 2001	
Amended October 1991	Amended March 2003	
Amended December 1992	Amended December 2003	
Amended March 1993	Amended March 2004	
Amended July 1993	Amended June 2004	

REGULATION NO. 2

2.1 CREATION OF NEW LOCALS

2.1.1 Minimum Number of Members

- (1) New locals shall have a minimum of fifty (50) members.
- (2) Notwithstanding the provision above, a new local with less than fifty (50) members may be created if the new locality is at least one hundred (100) kilometers from the existing local and it is not feasible to service the new local from the old local.

2.1.2 Voting Procedure

- (1) Members who wish to form a new local shall advise the existing local of their intentions and provide a petition signed by twenty-five (25%) of the affected members supporting the formation of the new local before a formal vote is conducted;
- (2) The members who wish to form a new local shall conduct a vote and provide evidence that the majority of the affected members agree to its formation;
- (3) The Regional Vice-President of the region shall be present to supervise the vote;
- (4) The Regional Vice-President shall confirm the validity of the vote to the Executive Council;
- (5) The ballot shall clearly express the question on the formation of a new local;

- (6) The Executive Council shall approve the formation of a new local by majority vote; and
- (7) A new vote cannot be held before twelve (12) months, if a majority of the affected members of the proposed new local vote against the creation of a new local.

2.1.3 Exception

- (1) Notwithstanding the provisions above, the Executive Council shall have the authority, by a two-thirds (2/3) majority vote, to establish new locals when the Executive Council believes that it is in the best interest of UTE to do so.

Adopted September 1997
Amended March 2000
Amended March 2002

Amended September 2005

REGULATION NO. 3

3.1 COMMITTEES

- (1) There shall be thirteen (13) standing committees: Bargaining, By-laws, Staffing, Technological Change, Health and Safety, Equal Opportunities, Employees Assistance Program, Finance, Honours and Awards, Workforce Adjustment, Harassment, Communications and Political Action.
- (2) There shall be temporary committees as they are required.
- (3) Meetings will normally be held in the National Capital Region.
- (4) A minimum of one National Officer shall sit on each committee.
- (5) When a committee Chair is unable to fulfil his/her duties for a temporary period of time the President shall:
 - (a) have the authority to appoint the other RVP sitting on the committee as the Interim Chair; and
 - (b) assign the Chair's Alternate RVP to the committee for the same period of time.
- (6) If the position of local president's representative on a committee becomes vacant, that position shall be filled by election of the local president's at the next sitting of the President's Conference.

- (7) Each committee shall meet at the call of the Chair or the Interim Chair a minimum of once in a two (2) year term.
- (8) The Chairperson or the Interim Chair determines the duration and method of approach to resolve the business before the Committee in consultation with the President.
- (9) Committee meetings shall be an authorized UTE expense.
- (10) No meetings with the CRA Officials shall be held without the authorization of the Executive Council, Executive Committee or the President.
- (11) The permanent committees of UTE take heed to both official languages.

Adopted September 1978
 Amended May 1979
 Amended August 1981
 Amended July 1984
 Amended September 1986
 Amended September 1987
 Amended September 1989

Amended December 1989
 Amended September 1992
 Amended December 1996
 Amended September 1999
 Amended September 2000
 Amended December 2003
 Amended July 2005
 Amended December 2007

REGULATION NO. 4

4.1 CONVENTION COMMITTEES

- (1) At least ninety (90) calendar days prior to the opening date of a Triennial National Convention, the Executive Council shall appoint such committees as may be necessary for the conduct of the business of the Convention.
- (2) There shall be four (4) standing committees:
 - (a) By-laws;
 - (b) Finance;
 - (c) Collective Bargaining; and
 - (d) General
- (3) Committee meetings shall normally be held in Ottawa at least sixty (60) calendar days prior to the opening date of a Triennial National Convention. Committee reports shall be provided to convention delegates at least thirty (30) calendar days prior to convention.

- (4) Convention committees shall be composed of the following:
 - (a) Officers of the Executive Council except the President; and
 - (b) Members of each region as selected on the basis on one (1) convention delegate for each Local as provided for in Regulation 1.

- (5) Notwithstanding the above, Regions with less than four (4) Locals shall be represented by a maximum of four (4) convention delegates and shall be selected in the following manner:
 - (a) One (1) delegate per Local;
 - (b) If necessary, the first additional delegate to be selected by the Local in the region having the largest number of members in good standing five (5) months prior to convention; and
 - (c) If necessary, the second additional delegate to be selected by the Local in the region having the second largest number of members in good standing five (5) months prior to convention.

Adopted June 1989
Amended December 1996
Amended March 2002
Amended June 2002
Amended July 2005

REGULATION NO. 5

5.1 UNFINISHED CONVENTION BUSINESS

- (1) The Executive Council shall consider and act upon all unfinished business prior to the conclusion of the second regular meeting of the Executive Council following the convention.
- (2) The disposition of all convention matters and resolutions by the Executive Council shall be published and shall include reasons for all decision along with recorded votes on all decisions.
- (3) Decisions, reasons for decisions and recorded votes shall be distributed to all convention delegates.

Adopted December 2002

Amended July 2005

REGULATION NO. 6

6.1 UTE DELEGATES TO PSAC CONVENTIONS

- (1) Delegates elected at a UTE Convention to represent our Union at a PSAC Convention must fully support all resolutions referred from our convention.
- (2) Notwithstanding paragraph (1), UTE delegates who have grave personal difficulties may abstain or absent themselves during a vote on a UTE resolution.
- (3) UTE delegates to a PSAC Convention shall not vote or speak against a resolution adopted at a UTE Convention.

Adopted July 1999

Amended December 2007

REGULATION NO. 7

7.1 REGIONAL OR INTER-REGIONAL CONFERENCES

- (1) Regional Vice-Presidents shall arrange regional or inter-regional conferences as required or if requested by a simple majority of Local Presidents.
- (2) At least thirty (30) days prior to the Conference, a Regional Vice-President shall submit, in writing to the President, a request for funding. The request shall include:
 - (a) the date;
 - (b) location;
 - (c) proposed agenda;
 - (d) proposed budget; and
 - (e) names of guests that require the spending of UTE funds.
- (3) Upon receipt of the Regional Vice-President's request, the President shall review it and inform the Regional Vice-President of the decision. If the decision is non-concurrence, rationale must be given. Concurrence will not be withheld by the President if the conference is requested by a simple majority of Local Presidents provided such conferences do not exceed two (2) in any fiscal year.
- (4) Following approval by the President an advance to cover expenses of the conference will be sent to the Regional Vice-President(s).
- (5) The Vice-Presidents shall be entitled to attend regional or inter-regional conference in which their Local is entitled to participate, and to attend any other Regional or Inter-Regional Conference if invited by a participating Region.

- (6) Within ninety (90) days of each conference, a Regional Vice-President shall:
 - (a) provide written minutes of the conference to the national office and to the delegates; and
 - (b) account for the advance obtained for the conference and any additional expenses incurred.
- (7) If the requirements of 7.1(6) are not met the President shall not consider any additional advances under this regulation.
- (8) Regional Vice-Presidents shall obtain and maintain a separate bank account for the purpose of depositing funds received for Educational Courses and Regional or inter-Regional Conferences and issuing the reimbursement of expenses.

7.2 GUIDELINES FOR REGIONAL EDUCATION BUDGETS

- (1) the regional education budget is divided equally among the ten regions;
- (2) for a regional to use their educational budget, it must be matched dollar for dollar from their regional budget;
- (3) the President may approve the use of the educational budget for approved UTE courses, in part, or in combination of the approved courses;
- (4) portions allocated to each region that are not used in a given year shall be carried over to a subsequent year for that region until the next UTE Convention;
- (5) Non-UTE educational courses shall need the approval of the Executive Council. Once Council has approved a course it will be an approved UTE course. Therefore only needing the approval of the president in the future:

Staffing	OFL Return to Work Course
Grievance Handling	PSAC's Duty to Accommodate
Harassment	
Developing Membership Activism	

Adopted September 1986
 Amended March 1987
 Amended July 1987
 Amended September 1989
 Amended July 1990
 Amended December 1996
 Amended March 2002
 Amended July 2002

Amended December 2002
 Amended December 2003
 Amended March 2004
 Amended June 2005
 Amended July 2005
 Amended December 2007
 Amended July 2008

REGULATION NO. 8

8.1 DUTIES OF VICE-PRESIDENTS

- (1) The 1st Vice-President:
 - (a) shall attend all meetings of the PSAC National Board of Directors;
 - (b) shall serve on committees.
- (2) The 2nd Vice-President:
 - (a) may attend as an observer one meeting of the PSAC National Board of Directors each year without taking into account the possibility of having to replace the 1st Vice-President;
 - (b) shall serve on committees.
- (3) The Regional Vice-President:
 - (a) is to visit, at least once in each year, the Locals in their region;
 - (b) attends all Executive Council, Regional and National Union Management Meetings. If no minutes are being prepared, reports in writing to the respective Locals within thirty (30) days;
 - (c) arranges regional and inter-regional meetings as required;
 - (d) serves on committees;
 - (e) provides guidance and counselling to Locals when requested by the Local or the Executive Council;
 - (f) acts as a representative or assists in the presentation of complaints, grievances or appeals;
 - (g) assists in Local consultation when requested;
 - (h) when necessary, assists in the training of Local officers through courses or seminars;
 - (i) ensures effective communication is maintained to all levels of UTE;
 - (j) reviews and suggests changes to Local By-laws;
 - (k) performs other related duties as required;

- (l) submits to the National Office at least two weeks prior to an Executive Council meeting, written report of their activities, expenses incurred, agenda items including motions, rationale and where applicable, supporting documentation;
- (m) may attend a PSAC National Board of Director's meeting once during their current term of office regardless of the location of the National Board of Directors meeting. This is a meeting of the Regional Vice-President's choice with prior approval of the National President.

Adopted 1970	Amended December 1996
Amended December 1975	Amended September 2002
Amended March 1978	Amended December 2007
Amended September 1978	Amended July 2008
Amended August 1981	
Amended September 1986	
Amended July 1987	
Amended July 1990	
Amended September 1992	

REGULATION NO. 9

9.1 DUTIES OF THE ALTERNATE REGIONAL VICE-PRESIDENTS

- (1) The Alternate Regional Vice-Presidents:
 - (a) assume the duties of the Regional Vice-Presidents in their temporary absence or incapacity;
 - (b) assist or replace Regional Vice-Presidents on request;
 - (c) serves on committees when appointed;
 - (d) performs such services within the region as the Executive Council may direct;
 - (e) may attend an Executive Council Meeting held at the same time as a President's Conference once each year, from July to July, in the course of his or her mandate beginning in July of convention year to July of the following convention, for a maximum of three meetings.
 - (f) submits to the National Office at least two (2) weeks prior to the Executive Council meeting a written report of their activities, expenses incurred and other pertinent information according to a standard format; and

- (g) performs other related duties as required.

Adopted March 1982 Amended September 2008
Amended September 1986
Amended July 1990
Amended December 1992
Amended December 1996
Amended June 2000
Amended July 2002
Amended July 2005

REGULATION NO.10

10.1 COLLECTIVE BARGAINING PROCEDURES

10.1.1 General

- (1) Any member participating in collective bargaining shall abide by the process of Collective Bargaining.
- (2) Bargaining proposals shall include changes to the existing Collective Agreement in the form of amendments, additions or deletions.
- (3) The President be an ex-officio member of the National Bargaining Committee and the PSAC/CRA Negotiating Team.
- (4) The 2nd Vice-President is also a member of the PSAC National Co-ordinating Strike Committee.

10.2 STANDING BARGAINING COMMITTEE

10.2.1 Composition

- (1) This committee is made up of:
 - (a) the 2nd Vice-President who is Chair of the Committee;
 - (b) the Regional Vice-President appointed by the Executive Council who is the Co-chair of the committee;
 - (c) two Local President representatives, one representing Tax Services Offices and another representing Tax Centers.

Total Committee members 4.

10.2.2 Duties and Responsibilities

- (1) The Committee:
 - (a) solicits, receives and organizes demands from Locals for the National Bargaining Committee;
 - (b) prepares the UTE program of demands and forwards them to the National Bargaining Committee.

10.3 NATIONAL BARGAINING COMMITTEE

10.3.1 Composition

- (1) This committee is made up of:
 - (a) Four members of the Standing Bargaining Committee;
 - (b) Chairs of each of the following Standing Committees:
 - (i) Staffing Committee
 - (ii) Technological Change Committee
 - (iii) Workforce Adjustment Committee
 - (iv) Health and Safety Committee
 - (v) Equal Opportunities Committee

Total Committee members 9.

10.3.2 Duties and Responsibilities

- (1) The Committee:
 - (a) receives the demands from the Standing Bargaining Committee, selects, modifies, writes or drafts a composite demand which represents the official position of UTE;
 - (b) establishes the priorities of the bargaining demands and submits them within established deadlines to the bargaining section of the PSAC;
- (2) The Committee is established by the President when a bargaining process is required.

10.4 PSAC/CRA NEGOTIATING TEAM

10.4.1 Composition

- (1)
 - (a) the first seat is allocated to the 2nd Vice-President;
 - (b) the second seat is allocated to the Regional Vice-President appointed by the Executive Council who is the Co-chair of the Standing Bargaining Committee;
 - (c) all other available seats will be selected from the members of the National Bargaining Committee.
- (2) The selection of the PSAC/CRA Negotiating Team members in (c) is done by the President; the 2nd Vice-President and the Regional Vice-President appointed by the Executive Council who is the Co-chair of the Standing Bargaining Committee.

10.4.2 Duties and Responsibilities

- (1) The Team:
 - (a) represents UTE members and protects their interests during bargaining meetings with PSAC and employer representatives.

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Amended February 1979	Amended March 1992
Amended June 1980	Amended July 1993
Amended February 1981	Amended September 1995
Amended August 1981	Amended December 1996
Amended March 1982	Amended December 1999
Amended March 1985	Amended June 2000
Amended September 1986	Amended August 2000
Amended March 1987	Amended March 2002
Amended June 1989	Amended March 2003
Amended July 2005	Amended December 2007

REGULATION NO. 11

11.1 GRIEVANCE REPRESENTATION POLICY

11.1.1 Grievance Steps 1st & 2nd Levels

- (1) Representation and costs involved in providing representation at the 1st and 2nd levels of the grievance procedure shall be the responsibility of the Local. In cases where the 1st and/or 2nd level is outside the Local's assignment area, and at the request of the Local all costs involved in providing representation for the grievance procedure (grievor, witnesses and representatives) shall be the responsibility of UTE.

11.1.2 Grievance Step 3rd Level

- (1) Representation and costs involved in providing representation at the 3rd level:
 - (a) shall be the responsibility of the Regional Vice-President or their Alternate Regional Vice-President in all cases where the grievor requests union representation; or
 - (b) where, in the opinion of the Regional Vice-President, the interest of the grievor are best served by another person then that person may be appointed to represent the grievor at the 3rd level with all costs related thereto to be borne by UTE;
 - (c) notwithstanding the Regulation, where the Local and/or grievor wishes to appoint their own representative at the 3rd level representation and where there is written concurrence with the President, they can provide such representation at their own cost.

11.1.3 Grievance Step 4th Level

- (1) Representation and costs involved in providing representation at the 4th level shall be the responsibility of the UTE national office.

11.1.4 General

- (1) It is incumbent upon the representatives at all levels of the grievance process to ensure that all grievances are dealt with in an expeditious manner.

Adopted October 1978
Amended August 1981
Amended September 1983
Amended July 1984
Amended September 1989
Amended July 1990
Amended September 1992
Amended December 1996
Amended July 2005

REGULATION NO. 12

12.1 STAFFING

- (1) Staff appointments shall be made pursuant to a selection process based on merit.
- (2) Staff, as required, shall be appointed by the Executive Committee, subject to any limitation that may be imposed by the Convention or by the Executive Council.
- (3) Terms and Conditions of Employment, including salaries for the Executive Assistant and Administrative Assistant, shall be established by the Executive Committee, subject to any limitations that may be imposed by the Convention or by the Executive Council.

Adopted September 1986
Amended July 1990
Amended December 1996

REGULATION NO. 13

13.1 REIMBURSEMENT OF EXPENSES

- (1) The purpose of this Regulation is to cover the reimbursement of expenses while on union business authorized by UTE.

13.2 PER DIEM

13.2.1 Executive

- (1) National Officers, when working on union business authorized by UTE outside their home metropolitan area shall be paid a per diem of ninety dollars (\$90.00) to cover the costs of meals and incidental expenses. This amount shall be paid for the day of departure from their home up to and including the day of return. However, a per diem of one hundred and fifteen dollars (\$115.00) shall be paid for Saturday and Sunday to those on authorized UTE business and not otherwise compensated by UTE.
- (2)
 - (a) Officers of the Executive Council attending a meeting of the Executive Council, a Presidents Conference, National Committee meeting, Regional Conference, Inter-regional Conference, Convention, Federation of Labour Convention, a CLC Convention or any other UTE Conference within their home metropolitan area shall be paid the per diem referred to in Regulation. For a National Committee meeting where the Officer is staying at a hotel with prior approval of the President or in their absence the 1st Vice-President they shall be paid the per diem referred to in Regulation.
 - (b) Officers of the Executive Council attending a meeting of a National Committee being held in the UTE National Office and not receiving a per diem under clause (a), shall be paid the lunch per diem referred to in Regulation. A dinner per diem referred to in Regulation may be paid with the approval of the President or in their absence the 1st Vice-President.
- (3) Officers of the Executive Council and designated UTE appeals representatives shall be paid the per diem referred to in Regulation when they either represent an appellant or act as a technical advisor at a hearing within their home metropolitan area.
- (4) UTE appeal representatives shall be entitled to reimbursement for the actual cost of expenses incurred in representing an appellant during an appeal, in addition to the per diem referred to in the above paragraph.
- (5) Officers of the Executive Council shall be entitled to reimbursement of necessary meals in accordance UTE rates as shown below, travel and parking costs while on union business authorized by UTE within their home metropolitan area except as provided in Regulation.
 - (a) Breakfast \$22.00
 - (b) Lunch \$28.00
 - (c) Dinner \$40.00

13.2.2 Members

- (1)
 - (a) Members of UTE who are not officers of the Executive Council shall be entitled to receive a per diem of ninety dollars (\$90.00) while on union business authorized by UTE outside their home metropolitan area or while attending a President's Conference or any other UTE Conference within their home metropolitan area. However, a per diem of one hundred and fifteen dollars (\$115.00) shall be paid for Saturday and Sunday to those on authorized UTE business and not otherwise compensated by UTE. Per Diem for Regional and Inter-regional Conferences shall be established by Regional Vice-Presidents.
 - (b) For a National Committee meeting where the member is staying at a hotel with prior approval of the President or in their absence the 1st Vice-President, they shall be paid the per diem referred to in Regulation.
 - (c) Members attending a meeting of a National Committee being held in the UTE National Office and not receiving a per diem under clause (b), shall be paid the lunch per diem referred to in Regulation. A dinner per diem referred to in Regulation may be paid with the approval of the President or in their absence the 1st Vice-President.
- (2) Members of UTE who are not officers of the Executive Council shall be entitled to be reimbursed necessary meals in accordance with UTE rates shown in Regulation plus travel and parking costs while on union business authorized by UTE within their home metropolitan area, except as noted in Regulation above.

13.3 ADVANCES

- (1) Officers of the Executive Council shall be entitled to obtain a standing advance of one hundred (\$100.00) to three hundred dollars (\$300.00) to deal with UTE business. Generally, this advance will be used for typing of correspondence, mailing costs, buying supplies and travelling.
- (2) Officers of the Executive Council shall not obtain more than three advances at the same time unless it has been authorized by the 1st Vice-President. This excludes the standing advance and any advance for Regional, Inter-regional Conferences or Executive Council meetings.

- (3) Officers of the Executive Council, prior to obtaining an advance, shall provide a detailed accounting to the best of their knowledge for the use of this advance unless it is used for an Executive Committee meeting, a Presidents' Conference or a meeting of a UTE Committee.
- (4) An advance for any member will not be issued under the amount of one hundred and fifty dollars (\$150.00) unless authorized by the 1st Vice-President.
- (5) An approved advance for any member including staff shall only include costs for travel, hotel and per diem. The travel portion of the advance shall normally be one half Latitude Class Airfare. Any other airfare shall have prior approval of the President or in their absence the 1st Vice-President.

13.4 TRAVEL TIME

- (1) UTE shall reimburse reasonable loss of wages required for union business authorized by UTE. For travel by air the reasonable loss of wages required shall depend on the proximity of the nearest airport and the frequency of departing flights and any connecting flights. This time will vary from none to one day, with one day being the exception to the rule.
- (2) If members have been authorized by the President or designate to travel by means other than by air then reasonable loss of wages required to have the member arrive at the destination at a reasonable hour will be reimbursed. This time will vary from none to one-half (1/2) day, with one-half (1/2) day being the exception to the rule.
- (3) If a member chooses to travel by means other than by air, and where air travel is more timely, only reasonable loss of wages that would be for air travel shall be reimbursed.
- (4) All members are expected to schedule their travel arrangements in a manner that they shall not incur any expenses that are either unreasonable or not required.

13.5 TRAVEL EXPENSES

13.5.1 Travel Grants to Locals

- (1) Local travel grants for delegates and or paid observers, issued by the National Office for Conferences and Conventions will be issued in the name of the local for their administration and accountability.

- (2) The travel grants for locals shall normally be the cost of 1.5 times the Latitude Class Airfare without receipt. The intent of the 1.5 airfare is to ensure the participation of the delegate and to assist locals in sending additional participants. Any Airfare other than as described herein shall have prior approval of the President or in their absence the 1st Vice-President.
- (3) At the request of the conference organizers Council may approve travel grants for locals to be the cost of a Tango Plus Airfare (as of the date of the advances) without receipt. Any Airfare other than as described herein shall have prior approval of the President or in their absence the 1st Vice-President.
- (4) If the local receives a travel grant and does not send participants, they must return the travel grant in full to the National Office.

13.5.2 Travel expenses

- (1) Travel expenses for all others including staff shall be the actual cost incurred. However, if the cost exceeds a Tango Plus Airfare without receipt, prior approval is required of the President or in their absence the 1st Vice-President.
- (2) If travel by car has been approved, the reimbursement rate shall be the highest rate set by the CRA for the ten (10) provinces plus one (.01) cent.

13.6 AUTHORIZATION

- (1) Officers of the Executive Council, who are spending UTE funds, who are invited to attend meetings of the PSAC, Canadian Labour Congress, Federations of Labour or any other organizations, must submit their request to the President for approval before the meetings take place. The President shall not refuse these requests without valid reason.
- (2) All loss of wages required to attend the National Office to meet with any National Office staff must be authorized by the President before any expense claim will be considered for approval.
- (3) Any other expenses not included in this policy may with the concurrence of the President, be approved by the 1st Vice-President.
- (4) Expense claims shall be submitted to the President. The President may delegate the Executive Assistant to the President the authority to approve expense claims or the 1st Vice-President for authorization.
- (5) The expense claim of the 1st Vice-President shall also be reviewed by the 2nd Vice-President or the Regional Vice-President currently serving on the Executive Committee.

- (6) The expense claim of the President shall also be reviewed by the 2nd Vice-President or the Regional Vice-President currently serving on the Executive Committee.
- (7) All expense claims, including those of staff, shall be subject to verification by the 1st Vice-President. Payments, if required, shall be forwarded to the claimant.
- (8) Any expense claim in dispute shall be forwarded to the Executive Council for resolution.
- (9) All locals shall obtain prior UTE authorization before hiring a lawyer if they intend to claim reimbursement for legal fees from UTE.

13.7 DAY OFF

- (1) Members of the Executive Council shall be entitled to reimbursement of one additional day for loss of wages, if loss incurred, to a maximum of six (6) days per year when they:
 - (a) attend UTE Executive Council followed by a Presidents' Conference; or
 - (b) attend UTE National Committee meeting preceded or followed by a UTE Executive Council meeting; or
 - (c) attend UTE National Committee meeting preceding or following a UTE Executive Council meeting and a Presidents' Conference.
 - (d) attend UTE National Committee meeting preceding or following a conference or a convention that last more than six (6) consecutive days.

13.8 GENERAL

13.8.1 Non-Commercial Accommodation Allowance

- (1) The President or 1st Vice-President may approve the use of non-commercial accommodation for authorized UTE business. If approved, an allowance of \$50.00 per day night will be paid.
- (2) The use of non-commercial accommodations will not increase any other expense that would be paid had the individual stayed at a commercial accommodation.

13.8.2 Incidental Allowance

- (1) Any member using commercial or institutional accommodations (i.e.: Rigaud, Nav Can, a University) that provides all meals will be entitled to an incidental allowance of \$17.00 a day, excluding the days of travel. A full per diem will be applicable on the days of travel.

13.8.3 Receipts

- (1) The following receipts should be attached to the expense claims:
 - (a) cost of hotel paid; and
 - (b) miscellaneous expenses
- (2) The reimbursement of these expense claims shall be done as soon as possible.
- (3) The reason for each expense that is claimed should be indicated as clearly as possible.

13.9 GUIDELINES FOR EXPENSES

The following guidelines are developed to clarify UTE's By-Laws' and Regulations with respect to the reimbursement of expenses.

These Guidelines are to cover expenses of individuals carrying out authorized union business. Individuals are defined as the President, 1st Vice President, 2nd Vice-President, Regional Vice-Presidents, Alternate Regional Vice-Presidents, Committee members, staff and any other member on authorized Union business.

- (1) Accommodations: Hotel expenses should be the most practical and economical rates available for the applicable area of the country.
- (2) Per Diem: Is set as per Regulation.
- (3) Ground Transportation: If traveling by airplane, train or bus, expenses will be reimbursed at the cost of normal taxicab service. (Other means of transportation are allowed if lower or equal to taxi cab.) For additional costs prior approval must be received from the President or 1st Vice-President.
- (4) Travel by Automobile: The President or 1st Vice-President must approve the use of a personal vehicle. The use of a personal vehicle will be reimbursed as per Regulation. The reimbursement of expenses for the use of rental cars must have prior approval and must be done on a practical and economic basis.

- (5) Parking: Parking expenses will only be reimbursed when the use of an automobile has been pre approved.
- (6) Family Care: Family care will be reimbursed as per Regulation.
- (7) Travel: All travel must be pre approved and the actual cost paid for expenses will be reimbursed as per the By-Laws and Regulations.
- (8) Miscellaneous General: All Miscellaneous expenses except tips must be receipted.
 - (a) Phone calls: A reasonable amount of telephone calls will be reimbursed.
 - (b) Sick/Vacation: If on authorized union business and you work less than 75 hours for CCRA in a given month. Thus causing a loss of vacation and sick credits. UTE will reimburse you for this loss by the submitting of a salary claim for the period, indicating loss of credits.
 - (c) Tips: A reasonable amount of tips will be reimbursed, example's include bell person at hotels, not included, tips at restaurants.
- (9) Executive Council Miscellaneous:
 - (a) Laundry: Reasonable amounts can be expensed for laundry charges for extended stays (7 days) or due to short times frames between trips or if the expenses have been pre approved for exceptional situations.
 - (b) Brief Cases: A member of Executive Council is entitled to a briefcase and replacement when necessary (approx. \$150.00).
 - (c) Luggage: Executive Council is entitled to an appropriate set of luggage at a pre approved reasonable price and to be replaced when necessary.
 - (d) Telephone Accessories: As each member of council is given the use of a cell phone, UTE will reimburse for approved cell phone accessories (i.e. case, hands free etc).
 - (e) Computer Accessories: As each member of council is given the use of a Laptop computer UTE will reimburse for approved computer accessories. (i.e. printer ink, mouse, etc).
 - (f) General Office Supplies: As this is considered to be covered by the Council members' residence expense only pre approved exceptional items will be reimbursed.

- (g) Postage: The expense of regular stamps should come from the Council members' residence expense. Large postage items, parcels etc can be reimbursed by attaching receipts to the expense claims. (i.e. grievance files.)
- (h) Day Off: As per Regulation.
- (i) Admin Day: Members of Executive Council (excluding the President or the 1st Vice-President) may use an administration day to complete union work if approved by the President or the 1st Vice-President.
- (j) Residence Expense: Members of the Executive Council (excluding the President or 1st Vice-President) shall receive twice yearly a residence expense to be paid in the months of June and December an amount of \$100.00 per month.
- (k) A Stipend: Members of the Executive Council (excluding the President and 1st Vice-President) shall receive twice yearly a stipend to be paid in the months of March and September in the amount of \$150.00 per month.

Adopted September 1986	Amended July 1999	Amended June 2004
Amended December 1986	Amended June 2000	Amended December 2004
Amended March 1988	Amended March 2001	Amended July 2005
Amended June 1988	Amended December 2001	Amended September 2005
Amended September 1989	Amended March 2002	Amended June 2006
Amended July 1990	Amended June 2002	Amended September 2006
Amended December 1990	Amended July 2002	Amended June 2007
Amended December 1992	Amended September 2002	Amended April 2009
Amended March 1993	Amended December 2002	
Amended December 1996	Amended June 2003	
Amended March 1997	Amended December 2003	

REGULATION NO. 14

14.1 CORPORATE CREDIT CARD

- (1) Executive Council members may apply for a joint corporate credit card with UTE.
- (2) Use of this card is only for expenses incurred for authorized union business.
- (3) Support documents shall be submitted with any expense claim referring to expenses paid with this card.
- (4) The account is sent directly to UTE.

Adopted June 2000

REGULATION NO. 15

15.1 FUNDING FOR NON-UTE EVENTS POLICY

- (1) UTE members, other than Executive Council or National Committee members, attending a non UTE event may request funding for two (2) of the following costs if they are not being reimbursed by any other organization for the same costs, unless approved by the President. The cost for transportation will be the most economical means for example seat sales, mileage:
 - (a) transportation;
 - (b) accommodation;
 - (c) per diem;
 - (d) lost wages; or
 - (e) registration fees.
- (2)
 - (a) The non UTE Union events must have prior approval of the Executive Council for UTE members to qualify for funding;
 - (b) Between Executive Council meetings and under extenuating circumstances non UTE events may receive prior approval of the President and the 1st Vice-President. Such approval shall be reported at the next Executive Council meeting. Such approval shall not unreasonably be withheld.
 - (c) All documentation regarding the event must be received prior to approval in (a) or (b) above.

- (3) Once the event has prior approval of the Executive Council or the President and the 1st Vice-President, the member may submit their request for funding directly to the Regional Vice-President who shall forward it to the 1st Vice-President or in their absence to the President with a recommendation.
- (4) Members who receive UTE funding for such events shall submit a report to the President within sixty (60) days of the event. The report shall include the value of the event for themselves and/or other UTE members and the topics covered.

15.1.1 General

- (1) This policy does not cover attendance at conventions.
- (2) No one event may exceed ten thousand dollars (\$10,000).

Adopted March 1998
Amended September 1998
Amended December 2001
Amended July 2005

Amended June 2006

REGULATION NO. 16

16.1 LOCAL LOAN POLICY

16.1.1 Loans to Locals

- (1) UTE may loan to any local part or all of a request for funds needed for Union business.
- (2) There shall be a written "loan agreement" between UTE and the local requesting the loan. UTE shall prescribe the details of a standard "loan agreement" document. The standard "loan agreement" shall be signed by the President and the 1st Vice-President, as well as, two local authorized persons.
- (3) All requests for a loan shall be subject to the review of the UTE National Finance Committee. The UTE National Finance Committee shall take into consideration the local's ability to repay when considering a request for a loan.
- (4) If a loan request is approved by the UTE National Finance Committee they shall recommend the payment of the loan to the Executive Council. A loan shall be granted upon a two thirds (2/3) majority vote in favour by the Executive Council in session.

- (5) If a loan request is denied by the UTE National Finance Committee they shall state their reasons for the denial, in writing, to the requesting local.
- (6) At no time shall UTE have more than one hundred thousand dollars (\$100,000) in outstanding loans to locals.

16.1.2 Terms and Conditions for a Loan

- (1) The minimum monthly amount of a loan repayment is one hundred dollars (\$100). These repayments shall be deducted by UTE from the local's monthly dues cheque before forwarding the local dues to the local.
- (2) The maximum number of months for any loan repayment is thirty-six (36).
- (3) All loans shall have interest calculated at the current Guaranty Investment Certificate (GIC) rate at the time of the loan.

16.1.3 Request Procedure for a Loan

- (1) The requesting local shall submit to UTE a Business Case for the loan. The Business Case, at a minimum, shall include: the amount of the loan, the reason for the loan, a repayment schedule and the amount, if any, that the local is expending themselves.
- (2) The requesting local shall submit to UTE a copy of the minutes from an Annual General Meeting or Special Meeting where the authorization for the loan was discussed and passed by the membership.
- (3) The requesting local shall submit to UTE a current set of Financial Statements.

Adopted September 1998.

REGULATION NO. 17

17.1 COMPUTER LOAN POLICY

17.1.1 Policy

- (1) UTE shall loan to any local part or all of the funds required purchasing a computer and printer subject to the procedures outlined in this Regulation.

17.1.2 Procedure

- (1) All requests for a loan shall be subject to the approval of the UTE National Finance Committee who shall take into consideration the local's ability to repay.
- (2) The Local shall submit to the UTE National Finance Committee a copy of the minutes authorizing the loan as discussed and passed by the membership at the Annual General Meeting or Special Meeting.
- (3) The local shall submit to UTE National Finance Committee a current set of Financial Statement.
- (4) The local shall submit the amount of the loan and their proposed repayment schedule.
- (5) The UTE National Finance Committee shall state the reasons for the denial, in writing, to the requesting local.

17.1.3 Terms and Conditions

- (1) UTE shall prescribe the terms and conditions of the loan in a written contract.
- (2) The minimum monthly repayment of one hundred dollars (\$100.00) shall be deducted by UTE from the local's monthly dues cheque.
- (3) The maximum length of the loan shall not exceed thirty-six (36) months.
- (4) Any loans under twelve (12) months shall be interest free.
- (5) All loans over twelve (12) months shall carry the interest calculated at the current rate of a Guaranty Investment Certificate (GIC) for the entire period of the loan.
- (6) The President and the 1st Vice-President and two (2) persons authorized by the local shall sign the contract.

Adopted December 1997
Amended March 2000

Amended March 2002
Amended December 2002

REGULATION NO. 18

18.1 ALTERNATE LOCATION FUND

18.1.1 Alternate Location Fund Policy

- (1) Locals having members who work in locations situated more than one hundred (100) kilometers away from the local and who must communicate with its members by either visiting these locations or bringing activists from locations to local meetings may access this fund once per calendar year, for each of its locations.
- (2) A budget of ten thousand (\$10,000) per year be allotted for this fund.

18.1.2 Procedure

- (1) The local president must submit their request in writing and receive prior authorization from the President or the 1st Vice-President.
- (2) The request must include the nature of the event and an explanation of how the local will use the funds.
- (3) When the funds are utilized by a member who lives in a location, the local will be reimbursed for two (2) of the following costs:
 - (a) travel;
 - (b) accommodation;
 - (c) per diem; or
 - (d) loss of wages.
- (4) The local may also request funding for other forms of communication or participation of members i.e. conference call, group bussing to events and any other reasonable situation.
- (5) When the fund is to be utilized by local executives to visit a location, UTE will fund two members of the Local Executive to visit the location.

Adopted March 2000
Amended December 2001
Amended June 2002
Amended July 2002
Amended September 2003

REGULATION NO. 19

19.1 LOCAL TRANSLATION FUND GUIDELINES

19.1.1 The \$5000.00 local translation fund be allocated as follows:

- (1) The fund will be distributed on a first come first served basis.
- (2) A local may not use more than \$1000.00 per year.
- (3) It is the responsibility of the local to get prior written approval from the 1st Vice-President or in their absence the President to expend these funds. This approval is on the financial amount not on content.
- (4) Translation completed without prior authorization will be the responsibility of the local.
- (5) The local will submit the invoice to the National Office for payment.

Adopted December 2002
Amended December 2006

REGULATION NO. 20

20.1 MEMBERS WITH DISABILITY

- (1) UTE shall establish an assistance fund for Locals to ensure that members with disability are informed about union activities and given access to them.
- (2) A budget of five thousand (\$5000) per year shall allotted for this fund.
- (3) Financial assistance shall be defined as: charges for any accommodations to allow members with disability to participate in activities.
- (4) Union activities shall be defined as follows: Presidents' Conference, inter-regional, pre-convention, national conferences, general meetings of Locals and any other training activities.

- (5) Locals applying for this fund shall be asked to submit the following information in writing:
 - (a) The type of activity, dates and location where the activity will take place, the amount or estimated amount of the request and;
 - (b) The reason for requesting assistance.
- (6) The request for funding shall be submitted to the 1st Vice-President responsible for Finance for approval or in their absence, the President.
- (7) The Local, after spending the funds, shall submit an expense claim with all receipts.

20.2 ACCESSIBILITY AND DISABILITIES

- (1) UTE shall complete a pre-assessment for accessibility of all facilities and technical aids required prior to the booking of a UTE sponsored event.
- (2) The pre-assessment shall be completed in consultation with a member of a UTE Equal Opportunities Committee, i.e. (local, regional or national) as the event dictates.
- (3) All conferences, conventions and caucus held for members with disabilities, shall be accommodated with recognition for the need for dietary requirements, medication, mobility assistance, etc. (i.e. diabetics, brain tumor- require medication with or after scheduled meals).

20.3 ALTERNATE FORMAT

- (1) UTE will provide information and publications in alternate format to its identified members.

Adopted March 2001
Amended December 2001
Amended September 2002

Amended March 2007
Amended June 2008

REGULATION NO. 21

21.1 FAMILY CARE EXPENSES

- (1) UTE members shall be entitled to be reimbursed for Family care expenses in respect of children sixteen (16) years of age or younger and for adults who are in need of special care and who either permanently reside in the household of the member or with whom the member permanently resides.
- (2) Family care expenses shall be reimbursed to members who are required to attend union business authorized by UTE.
- (3) Family care expenses shall be reimbursed provided that an approved signed statement is submitted by the claimant.
- (4) Family care expenses which are part of a member's normal family care arrangements shall not be paid.
- (5) Reasonable family care expenses shall be reimbursed in accordance with the UTE Guidelines. Claims of an exceptional nature may be reimbursed subject to the approval of the 1st Vice-President.

21.2 UTE GUIDELINES

21.2.1 Normal Family Care Arrangements

- (1) Normal Family Care Arrangements are defined as those arrangements that would cause family care expenses to be incurred if you were at work performing duties for the employer during scheduled hours of work. It also includes any arrangement during hours not at work but expenses would be incurred whether you were performing union duties or not.
- (2) Family care expenses shall not be reimbursed if the member has their spouse, significant other or the person who provides the family care accompany them to the union event.
- (3) Family care expenses shall not be reimbursed if the member has their spouse, significant other or the person who provides the family care and the person who requires family care accompany them to the union event.

- (4) Family care expenses shall not be reimbursed if the member is on leave (with or without pay) from the CRA but would normally incur family care expenses if they were at work, unless the member is not also being reimbursed for salary expenses for the same authorized UTE activity by UTE.

Adopted September 1985
Amended July 1990
Amended December 1996
Amended March 1997
Amended December 2001

Amended December 2007
Amended June 2008

REGULATION NO. 22

22.1 TERMS AND CONDITIONS FOR THE POSITION OF THE ELECTED PAID OFFICERS

- (1) The purpose of this Regulation is to state the terms and conditions of the elected and full-time paid positions of the President and 1st Vice-President of UTE.

22.1.1 Tenure of Office

- (1) The tenure of office for the officers shall be in accordance with the By-Laws.

22.1.2 Pay

- (1) The Officers shall be remunerated as provided:

(a) The President:

\$101,500.00 (2009)
\$104,000.00 (2010)
\$106,500.00 (2011)

(b) The 1st Vice-President:

\$85,700.00 (2009)
\$87,800.00 (2010)
\$90,000.00 (2011)

- (2) Notwithstanding the above the incumbent, if re-elected to the previously held position, shall retain the increment level held before the election took place;
 - i) if the salary scale set by convention is less than the incumbents current year three, the incumbent will maintain the new year three salary; and
 - ii) if the salary scale were increased the incumbent would move to the appropriate salary level as approved by the Executive Committee.
- (3) The Officers shall, in lieu of normal salary, receive strike pay in accordance with PSAC policy during periods when the UTE Membership is on a general strike.

22.1.3 Designated Paid Holidays

- (1) The Officers shall be entitled to designated paid holidays on the same basis as the UTE Membership.

22.1.4 Sick Leave

- (1) The Officers shall earn sick leave credits at the rate of one and one-quarter (1 ¼) days for each calendar month for which pay is received for at least ten (10) days.
- (2) The Officers shall be granted sick leave with pay when unable to perform duties assigned because of illness or injury provided that the Officers have the necessary sick leave credits.
 - (i) the President shall notify the 1st Vice-President when utilizing such credits; and
 - (ii) the 1st Vice-President shall notify the President when utilizing such credits.
- (3) If an Officer has insufficient credits to cover the granting of sick leave with pay under the provisions of this section, sick leave with pay may, at the discretion of the Executive Committee, be granted up to twenty-five (25) days. The granting of more than twenty-five (25) days advanced sick leave to the either Officers must be approved by the Executive Council before sick leave is granted.
- (4) Subject to Regulation below, when either Officer is unable to perform assigned duties because of illness or injury and such illness or injury prevents the Officer from attending the Convention and seeking re-election, that person shall be entitled to be granted sick leave to the limitation of earned sick leave credits or for the duration of the illness whichever is less provided the Executive Council is satisfied that the Officer is unable to work due to illness or injury.

- (5) In a case referred to in Regulation above, if an Officer is eligible to receive benefits from Disability Insurance, an application must be made for such benefits and UTE must be paid any amount received from Disability Insurance for the period between the date of the termination of office and the date of the termination of sick leave with pay.
- (6) If the an Officer dies or otherwise ceases to be employed, for reasons other than disciplinary, the Officer or the estate shall, in lieu of earned sick leave with pay, be paid an amount equal to the product obtained by multiplying the number of days of earned but unused sick leave by the applicable daily rate of pay as a CRA employee immediately prior to the Officer being elected. All pay out of sick leave must be completed at the end of each three (3) year term of office.
- (7) The officers shall report the balance of their sick leave credits available at each Executive Council meeting verbally.

22.1.5 Vacation Leave with Pay

- (1) For each calendar month in which an Officer earns at least ten (10) days' pay, vacation credits with pay shall be earned at the rate:
 - (a) one and one-quarter (1 1/4) days until the month in which the anniversary of her/his sixth (6) year of continuous employment occurs;
 - (b) one and two-thirds (1 2/3) days commencing with the month in which her/his sixth (6) anniversary of continuous employment occurs;
 - (c) two and one-twelfth (2 1/12) days commencing with the month in which her/his fourteen (14th) anniversary of continuous employment occurs effective April 1, 1999.
 - (d) two and one-half (2 1/2) days commencing with the month in which her/his twenty-third (23rd) anniversary of continuous employment occurs.
 - (e) employment with CRA shall be used in the calculation of continuous employment for purposes of Section 1.
- (2) In order to utilize this leave provision:
 - (i) the President shall notify the 1st Vice-President; and
 - (ii) the 1st Vice-President shall notify the President.

- (3) An Officer may carry over any vacation leave credits but not in excess of one year's entitlement.
- (4) If an Officer dies or ceases to be employed, the Officer or the estate shall, in lieu of earned vacation leave with pay, be paid an amount equal to the product obtained by multiplying the number of days earned but unused vacation leave by the daily rate of pay applicable immediately prior to the termination of employment.
- (5) The officers shall report the balance of their vacation leave credits available at each Executive Council meeting verbally.

22.1.6 Other Types of Leave

- (1) An Officer shall be entitled to other types of leave with or without pay on the same bases to those leave provisions in the UTE/AEU collective agreement.
- (2) In order to utilize the leave provisions:
 - (i) the President shall notify the 1st Vice President; and
 - (ii) the 1st Vice-President shall notify the President.

22.1.7 Severance Pay

- (1) Subject to Regulation below, when the employment of an Officer terminates for any reason other than removal from office under Section 25, sub-section 1 of the Constitution of the PSAC, there shall be an entitlement to one (1) week's pay at the current rate of pay for each completed year of continuous employment in UTE, in respect of which severance pay has not been previously paid. Severance pay shall not exceed twenty-eight (28) weeks of pay.
- (2) Severance pay entitlement determined in accordance with Regulation above shall be abated by the full amount of severance pay payable by the Public Service for the period of Public Service employment included in the total eligible service.
- (3) Notwithstanding Regulation above, if an Officer who terminates employment with UTE returns to employment in the Public Service, the entitlement to severance pay shall be only for the period of continuous employment with UTE.
- (4) If an Officer dies during the employment with UTE, there shall be paid to the estate an amount equal to the amount that Officer would have otherwise been entitled to at the time of termination of employment with UTE.

22.1.8 Travel Expenses

- (1) The Officers are entitled to be reimbursed travel expenses as they apply to the other officers of the Executive Council.

22.1.9 Relocation Expenses

- (1) The Officers are required to reside in the Greater Ottawa area.
- (2) The purpose of this Regulation is to authorize UTE to reimburse those actual and reasonable expenses within the limits of the CRA Relocation Directive save for any provisions in that directive which may provide for housing cost differential payments or mortgage interest cost differential payments incurred by the Officers, spouse and dependent members of the family in relocating from one place of residence to another, either at the time of election or at the time of termination of employment as a full-time Officer.
- (3) A member who is elected as a full-time Officer shall be paid relocation expenses when at the time of election such member is residing outside of the Greater Ottawa Area and must move to the Greater Ottawa Area to comply with the requirement of this Regulation.
- (4) When an Officer ceases to be employed as a full-time officer for any reason, except misconduct, such member shall be paid relocation expenses provided that such member;
 - (a) was residing outside the Greater Ottawa Area at the time of election; and
 - (b) does not accept other employment in the Greater Ottawa Area after the termination of employment as full-time elected officer; and
 - (c) applies for relocation expenses within six (6) months following the termination of employment as full-time elected officer.
- (5) An Officer who ceases to be employed as full-time elected officer of UTE and who applies for and is entitled to relocation expenses shall be entitled to be reimbursed those actual and reasonable expenses not exceeding an amount equal to the relocation expenses from Ottawa to the former place of residence.
- (6) If an Officer dies during the term of office, a spouse and/or dependants shall be entitled to be reimbursed relocation expenses subject to the same conditions specified in Regulation. Upon the request from the immediate family assistance may be paid for the transportation of the remains of the deceased officer to the former place of residence in accordance with the conditions specified in Regulation.

- (7) An Officer, who is not entitled to relocation expenses under this Regulation, upon ceasing to be employed as a full time elected officer of UTE, may request reimbursement of reasonable relocation expenses to the Executive Committee. The Executive Committee may recommend to the Executive Council the payment of relocation expenses.

22.1.10 Other Benefits

- (1) UTE shall pay the employer's portion of all Federal Public Service benefit plans for which the Officer becomes liable in order to maintain the plans in force while on leave without pay from the Federal Public Service.
- (2) The Officers are entitled to all other benefits on the same terms and conditions as those enjoyed by the Executive Assistant with the exception of those types of plans discussed in Regulation.
- (3) The Officers shall be entitled to receive a bilingualism bonus on the same basis and under the same conditions that apply to all UTE employees.
- (4) No additional benefits other than those described in this Regulation shall be granted to the Officers unless they are approved by the Executive Council prior to their implementation.

Adopted July 1984

Amended September 1984

Amended October 1984

Amended June 1986

Amended March 1987

Amended July 1990

Amended June 1991

Amended December 1992

Amended March 1993

Amended December 1995

Amended December 1996

Amended March 2001

Amended June 2002

Amended July 2002

Amended July 2005

Amended September 2005

Amended December 2007

Amended July 2008

REGULATION NO. 23

23.1 MARGUERITE STONEHOUSE MEMORIAL SCHOLARSHIPS

Marguerite Stonehouse began her career with the Taxation Staff Association in the 1960's when it was part of the Federation of Public Servants. She attended the founding convention of the PSAC. With the formation of "locals" she became a Chief Steward in the Edmonton Local. Until her untimely death, she served, in various positions, the Union of Taxation Employees at both the local and national levels.

Like many other pioneering members of the fledgling Taxation Component she had to endure intimidation, harassment and discrimination from a management whose attitude towards the Union could best be described as negative. An example of her fight to gain union rights was her filing a complaint charging management with discrimination because of her union activity. After 2 long years of litigation the complaint was upheld. Her case became a landmark decision in the fight for union rights.

In recognition of her accomplishments, the Union of Taxation Employees has named the scholarship to the Labour College of Canada after her.

23.1.1 Marguerite Stonehouse Memorial Scholarships

- (1) The purpose of this Regulation is to state the terms and conditions of the Scholarships.
- (2) Every member in good standing of UTE who applies to the Canada Labour College Program can apply for the scholarships.
- (3) The Executive Committee of UTE shall award the scholarship by taking into account the recommendations made by the Canada Labour College Selection Committee.
- (4) Each year UTE will award one (1) scholarship for the four (4) week course and four (4) regional scholarships for the one (1) week course.
- (5) For the four (4) week course the following costs shall be borne by UTE.
 - (a) the full cost of tuition, books and college residence (as defined by the College);
 - (b) loss of salary and benefits and bilingual bonus while in attendance at the College. Loss of salary shall not include any shift premiums, weekend premiums or loss of overtime benefits;
 - (c) a per diem allowance in accordance with Treasury Board Rates to cover meals and incidentals for each day while in attendance at the College;
 - (d) the cost of three (3) ten (10) minute telephone calls home at the after 18:00 hours long distance rate for each week in residence at the College;
 - (e) the actual transportation costs to the College at the commencement of studies and return home on completion. This cost shall be limited to first class rail or economy air travel;

- (f) the actual transportation costs of one return trip home during the College session. This cost shall be limited to first class rail or economy air travel;
 - (g) family care expenses, if applicable, in accordance with current UTE policy; and
 - (h) other necessary expenses subject to the prior approval of the National President and the 1st Vice-President.
- (6) For the one (1) week course the following costs shall be borne by UTE;
- (a) the full costs of tuition, books and hotel;
 - (b) loss of salary and benefits and bilingual bonus while in attendance at the course. Loss of salary shall not include any shift premiums, weekend premiums or loss of overtime benefits;
 - (c) a per diem allowance in accordance with the UTE regulation on expenses for each day while in attendance at the course. If not staying in a hotel the meal rate for lunch will be paid;
 - (d) the cost of two (2) ten (10) minute telephone calls home at the after 18:00 hours long distance rate for the week of the course if required to call long distance;
 - (e) the actual travel costs to attend the course at the commencement of the course and return home on completion. This cost shall be limited to first class rail or economy airfare;
 - (f) family care expenses, if applicable, in accordance with current UTE policy and;
 - (g) other necessary expenses subject to the prior approval of the National President and the 1st Vice-President.

Adopted June 1985
Amended July 1987
Amended September 1989
Amended December 1996
Amended September 1998
Amended December 1999

REGULATION NO. 24

24.1 HONOURS AND AWARDS

24.1.1 Administration

- (1) Nominations listed in this regulation can be recommended by a member of a Local, Local Officer or an officer of the executive council.
- (2) All submissions except for Service Pins should be submitted to the Chair of the Honours and Awards Committee.
- (3) The committee shall have at least 30 days to review all submissions prior to a making a recommendation to executive council.
- (4) The Honours and Awards Committee shall present the nomination, with its recommendation, at the following meeting of the Executive Council.
- (5) All recipients of UTE member awards must be a member in good standing.

24.2 CERTIFICATE OF ACHIEVEMENT (AL Lough Award)

- (1) The award shall be a suitably inscribed certificate.
- (2) Nominees have:
 - (a) demonstrated their commitment to achieving the aims and objectives of UTE and;
 - (b) exhibited exemplary service at any level of UTE.

24.2.1 Presentation

- (1) The award shall be presented at a Local, Regional or National Event by a Union Official.

24.3 SERVICE PINS

- (1) Service pins of three (3), five (5), ten (10), fifteen (15), twenty (20), twenty-five (25), thirty (30), thirty-five (35) years will be awarded annually by the locals to those members who have served the membership within the union movement. Such pins shall be awarded based upon a Local member's recommendation or National Officers' recommendation.

24.3.1 Presentation

- (1) The award shall be presented at a Local, Regional or National Union Event by a union official.

24.4 Award of Merit (Godfroy Côté Award)

- (1) The award shall be a suitably inscribed plaque
- (2) Nominees have:
 - (a) demonstrated their commitment to achieving the aims and objectives of UTE;
 - (b) exhibited exemplary service at any level of UTE;
 - (c) accumulated service at any level of UTE for a minimum of five (5) years

24.4.1 Presentation

- (1) The award shall be presented at a Local AGM, President Conference, or a National Conference by a Local President, National Officer or Chair of Honours and Awards committee wherever feasible

24.5 LIFE MEMBERSHIP

- (1) The award shall be a suitably inscribed plaque.
- (2) Members shall have all the rights as described in by-law 3, Section 3.
- (3) Members shall be entitled to a UTE ring or an engraved UTE watch.
- (4) Nominees must have:
 - (a) demonstrated their commitment to achieving the aims and objectives of UTE;
 - (b) accumulated service at the local and national level of UTE for a minimum of fifteen (15) years;

- (c) exhibited exemplary service at the local and national level of UTE.
 - i) Definition of Exemplary Service:
 - (1) outstanding;
 - (2) serving as an example;
 - (3) admirable, commendable, ideal model, praiseworthy or exceptional.
 - ii) Examples of Exemplary Service:
 - (1) Founder and organizer of the 1st UTE National UTE Women's Conference;
 - (2) Founder and organizer of the 1st UTE National EO Conference;
 - (3) Organizer of a foundation for Unions to help street kids and homeless people;
 - (4) Organizer of a foundation of for Unions to help members who have been terminated from D.I. and are no longer able to work.

24.5.1 Presentation

- (1) The award shall be presented at a President's conference or a National Convention by the chair of the Honours and Awards Committee or as determined by the committee.
- (2) If the nominee is not attending the event, UTE will cover the necessary expenses if the nominee wishes to attend to receive their award.

24.6 THE UNION OF TAXATION EMPLOYEES HUMANITARIAN AWARD

- (1) All nominations for this award must be received by the Chair of the Honours and Awards Committee by December 7th of each year.
- (2) The award shall be a suitably inscribed plaque and will include an award of \$2500.00.
- (3) The award and the recipient will be recommended by the Honours and Awards Committee to the Executive Council.
- (4) The monetary award will be paid to the cause espoused by the recipient or to a charity of their choice.

- (5) Nominees must have:
 - (a) be a member of UTE in good standing;
 - (b) demonstrated their commitment to a humanitarian cause where there is extreme need;
 - (c) exhibited exemplary service to others within their community, their country or throughout the world.
 - (i) Definition of Exemplary Service:
 - (1) outstanding;
 - (2) serving as an example;
 - (3) admirable, commendable, ideal model, praiseworthy or exceptionable.

24.6.1 AWARDS SUBMISSION

- (1) The application shall contain the following:
 - (a) name of the nominee;
 - (b) who the submission is from;
 - (c) introduction of the nominee;
 - (d) biography; and
 - (e) any tributes to the nominee's activities in the community and/or achievements within the union organization.

24.7 U.T.E. COMMUNITY SERVICE AWARD

- (1) The award shall be a suitably inscribed framed certificate.
- (2) Nominees must:
 - (a) be members in good standing of U.T.E.;
 - (b) demonstrated their dedication and commitment to their cause(s).
 - (i) Definition of dedication and commitment:
 - (1) involvement in their cause(s) for at least two (2) years;
 - (2) serving as an example;
- (3) The application shall contain the following;
 - (a) name of the nominee;
 - (b) who the submission is from;
 - (c) introduction of the nominee;
 - (d) short biography;
 - (e) detailed information as to the nominee's activities in the community;

- (f) detailed information indicating the time devoted and the level of achievement.

24.7.1 Presentation

- (1) The award shall be presented at a Local, Regional or National event by a Union Official.

24.8 UTE SCHOLARSHIP

The Union of Taxation Employees - PSAC
Scholarship Guidelines

The Union of Taxation Employees (U.T.E.) each year offers two (2) \$2,500.00 National Scholarships, one of which has been named the Diana Gee Scholarship and ten (10) \$1,000.00 Regional Scholarships (Atlantic, Quebec, Montreal, National Capital, Greater Toronto, South Western Ontario, Northern and Eastern Ontario, Prairie, Rocky Mountains and Pacific Regions).

If after reviewing the circumstances and agreed to by the National President and the Chair of the Honours and Awards Committee, the UTE may defer the awarding of a Scholarship of a successful applicant for a period of 12 months. If the Scholarship is not awarded after 12 months an additional Scholarship may be awarded for the current year.

Eligibility:

All scholarships are available for members in good standing of the U.T.E., their spouse, their common-law spouse (including same sex partners) and/or their children or grandchildren. However, no more than one scholarship will be awarded to the same family in a given year.

For this purpose, children or grandchildren of a U.T.E. member in good standing is defined as follows:

1. a person of whom the member is the natural parent or grandparent, whether the person was born within or outside marriage;
2. a person who is wholly dependent on the member for support and of whom the member has immediately or before the person attained the age of nineteen (19) years had, in law or in fact, the custody and control;
3. a child or grandchild of the member's spouse or common-law partner or;
4. an adopted child of the member.

Requirements:

- A 500 – 700 word essay or submission in an audio, visual (painting, drawing, sculpture or photograph), or video format that would express your view on one of the following topics:
 - What effect globalization is having on workers' rights and human rights in Canada;
 - Labor's contribution to the Community;
 - What you foresee as the role of organized labor in the future or;
 - Topic(s) selected by the U.T.E. Honours and Awards Committee that will be published each March.

Note: All submissions become the property of the U.T.E.

If your submission is by visual, please provide an explanation of how it meets one of the topics.

- Brief statements from two (2) persons with whom you have worked during the past year, containing their general evaluation of your work, your capabilities, your character and performance. These persons could include: teachers, clergy, community service leaders, supervisors etc. The statements may be sent directly to the U.T.E.;
- Proof of registration with the name of the University, College or Institute of higher learning you will be attending must be submitted with your application. Attendance shall be verified before the granting of the award; and
- A transcript of your most current academic standing. This is not applicable for anyone who has been out of school for more than two (2) years.

Criteria:

The U.T.E Honours and Awards Committee will base their selection on the following:

- Submission by the applicant (details outlined under requirements);
- Statement pertaining to your program and career plans;
- Statement of your community involvement and;
- Statement of your union involvement, that of your spouse or that of your parents.

Preference may be given to people entering their first year of University, College or Institute of higher learning. However, applicants may be entering years other than their first year. Attendance must be on a full time basis.

Preference may be given to first time recipients.

An applicant will not be excluded if they do not possess each and every criterion. The selection criteria will be reviewed as a whole.

The U.T.E. reserves the right to withhold the granting of an award if no applicant is deemed to possess the necessary requirements, or for other valid reasons. The U.T.E. Honours and Awards Committee may award a Regional Scholarship outside of a particular region if no applicants from that region are deemed to possess the necessary requirements or there were no applicants from that region.

All documents **MUST** be supplied with your application, otherwise it will be considered incomplete. **Your application MUST be postmarked by no later than June 15th.**

Application forms are available from your Local Union Executive, Regional Vice-President, the U.T.E. National Office and at: www.ute-sei.org (the U.T.E. website).

Completed application forms should be mailed or faxed to:

The Union of Taxation Employees
Attn: U.T.E. Honours and Awards Committee
233 Gilmour Street Suite 800
Ottawa, Ontario
K2P 0P2

Fax: 613-234-7290

Adopted September 1986	Amended December 2003	Amended April 2009
Amended March 1987	Amended March 2006	
Amended June 1988	Amended September 2006	
Amended September 1988	Amended December 2006	
Amended March 1989	Amended September 2007	
Amended December 1992	Amended December 2007	
Amended December 1996	Amended June 2008	
Amended December 2000	Amended September 2008	
Amended June 2002	Amended December 2008	

REGULATION NO. 25

25.1 TRUSTEESHIP

25.1.1 General Provisions

- (1) The Executive Council appoints by Power of Attorney a trustee to administer the local.
- (2) The President shall notify the local by registered mail or by hand of the decision to place the local under trusteeship and to appoint a trustee.
- (3) The trustee shall provide a written report to each Executive Council Meeting on their activities and the status of the Trusteeship.

25.2 INTERIM TRUSTEESHIP

- (1) Notwithstanding By-law 12, the President between Executive Council meetings, in consultation with the appropriate Regional Vice-President, may impose trusteeship on a local, appoint an interim trustee and seize the property of the local before officially advising the local.
- (2) The President shall report the interim trusteeship to the next meeting of the executive council.

Adopted June 2000

Amended June 2006

Amended December 2006

Amended December 2007

REGULATION NO. 26

26.1 DISCIPLINE PROCEDURES

26.1.1 General

- (1) Notwithstanding the procedures contained in this Regulation, disciplinary procedures may be initiated in accordance with the By-Laws at a higher level than where the actions giving rise to disciplinary action occurred.
- (2) Any accusation(s) which is found to be frivolous or intended to harass, embarrass, or discredit a member or members may result in a recommendation of disciplinary action to be included in the committee report.
- (3) Any member against whom an accusation of misconduct is alleged shall not be a member of the Committee established to investigate the allegation(s), and shall not be given voice or vote in the decision to accept or reject the findings and recommendations of such a committee.

- (4) Should the Committee in the process of their investigation receive information that leads to other provisions of the By-Laws, the Committee shall notify the member(s) concerned in writing and provide an opportunity for the member(s) concerned to respond. This information now becomes part of the investigation.
- (5) The procedure for dealing with any disciplinary situation which may arise at the local, PSAC Regional Area Council, PSAC National Board of Directors or Alliance Executive levels as found in the Constitution.
- (6) The procedure for dealing with any disciplinary situation, which may arise, which is not specifically outlined under this Regulation, shall be deemed to be covered and processed within the spirit and intent of this Regulation.

26.2 INVESTIGATION PROCEDURES

- (1) Any and all allegations against a member shall be in writing, signed by the member(s) putting forth the allegation(s), and submitted to the appropriate body for consideration:
- (2)
 - (a) allegations at the local level shall be submitted to the Local Executive;
 - (b) allegations that involve member(s) from more than one Local in a region shall be submitted to the Regional Vice-President;
 - (c) allegations that involve member(s) from more than one region shall be submitted to the President;
 - (d) allegations against Regional Vice-Presidents or Vice-Presidents shall be submitted to the President;
 - (e) allegations against the President in the capacity of component President shall be submitted to the 1st Vice-President;
 - (f) allegations against the President in the capacity of a member of the National Board of Directors shall be submitted to the PSAC Executive Committee.
- (3) The appropriate executive body receiving the allegation(s) shall determine whether *evidence warrants an investigation. If so, it shall establish an internal or external impartial investigation committee consisting of three (3) people to investigate and assess the allegation(s), including the receipt of oral and written evidence. (*evidence in that there must be some supporting documentation that the allegations are valid. It does not mean that conclusive evidence must be presented nor does it mean that the body concerned is accepting or rejecting the supporting documentation.)

- (4) The Committee shall provide the member against whom the allegation has been made with a copy of the written accusation(s). The member(s) submitting the allegation(s) and the member(s) against whom the allegation has been made, shall be afforded the right to appear before the Committee. The Committee may interview witnesses.
- (5) The Committee shall submit a committee report to the member against whom the allegation(s) has been made, the member(s) who submitted the allegation(s) and the appropriate body who established the Committee.
- (6) The committee report shall consist of one or two parts, depending on whether the allegation(s) are upheld by the Committee:
 - (a) Part I shall include a finding of fact for each accusation(s) and a determination whether a contravention of the By-Laws occurred. This part of the Report may also include a determination whether any accusation is found to be frivolous or intended to harass, embarrass or discredit a member.
 - (b) Part II shall indicate if corrective action is recommended including any specific disciplinary action such as, suspension from membership and/or removal from office.
 - (c) The committee report shall be dated and signed by the three people on the Committee and shall not be amended. The appropriate body that established the Committee must be satisfied that the proper procedure has been followed by the Committee and shall vote whether to accept the committee report in accordance with General Provisions 26.1.1(3).
- (7) If disciplinary action is not recommended, the appropriate body shall review and vote whether to accept the committee report. A simple majority vote of those in attendance shall determine acceptance. All decisions shall be conveyed in writing to the persons involved.
- (8) If disciplinary action is recommended at the national level, the committee report shall be subject to acceptance by a two-thirds (2/3) majority vote at a meeting of the Executive Council. Should the committee report recommendations not receive two-thirds (2/3) acceptance, rationale for the rejection must be provided.
 - (a) If the Executive Council accepts a recommendation of removal from office, the President shall provide the member(s) concerned with written notice that an appeal may be submitted to the PSAC National Board of Directors within sixty (60) calendar days of receipt of the disciplinary notification.
 - (b) If the Executive Council accepts a recommendation to suspend or expel from membership the President shall submit such recommendation to the PSAC National Board of Directors together with all relevant documentation.

26.3 GUIDELINES FOR INVESTIGATION PROCEDURES

26.3.1 Investigation Committee

- (1) The role and responsibilities of the Committee include:
 - (a) providing the member accused with a copy of the written accusation(s);
 - (b) ensuring the investigation is impartial and is seen as such by all parties;
 - (c) investigating the allegations with appropriate discretion and ensuring that the investigation is done in a timely fashion;
 - (d) interviewing witnesses and reviewing all relevant documents identified by the parties;
 - (e) submitting a written report to the body which established the Committee, the member making the accusation and the member accused.

26.3.2 Investigation Procedures

- (1) The members of the Committee shall develop the appropriate methodology for the investigation based on the allegation(s) and the mandate of the Committee.
- (2) The member making the accusation and the member accused may provide the Committee with a list of witnesses to be interviewed by the Committee. A witness is an individual who witnessed the alleged misconduct or who has some other type of relevant information that will assist in determining whether a contravention occurred. The committee shall determine which witnesses they believe may have relevant information related to the allegation. A process for interviewing witnesses shall be developed, for example, the Committee may determine whether witnesses shall be given the option of providing a narrative in their own words, respond to questions from the Committee, or a combination of both.
- (3) The committee shall ensure that:
 - (a) witnesses are advised of the mandate of the Committee;
 - (b) witnesses are aware that they may be accompanied by a person of their choice to the interview;
 - (c) interviews are conducted in an appropriate confidential area;

- (d) the applicable portion of the draft report be sent to witnesses for review of their statements when such statements are used in the report;
- (e) all Committee members take their own notes during the interview.

26.3.3 Committee Report

- (1) As required by this Regulation, the committee report shall be written in one or two parts. Part 1 shall include a finding of fact for each allegation and a determination whether the contravention of the constitution, Local, and/or UTE, and/or PSAC By-Laws occurred. This part of the report may also include a determination whether any allegation is found to be frivolous or intended to harass, embarrass or discredit a member.
 - (a) Part I of the committee report might also include:
 - (i) committee composition;
 - (ii) description of the alleged misconduct;
 - (iii) mandate of committee;
 - (iv) methodology (including reference materials, list of witnesses and dates of interviews.);
 - (v) findings.
 - (b) Part 2 of the report shall indicate whether corrective action is recommended including any specific disciplinary action. When an allegation of misconduct involves harassment, the committee report shall not include the actual names of those involved with the exception of the name of the individual who is recommended for discipline. This measure shall provide some confidentiality in the event that the committee report is submitted to the Executive Council and included in the minutes.
- (2) The committee shall submit a draft copy of the final report to the body that authorized the establishment of the committee for review and amendments if deemed necessary, prior to sending it to the Executive Council. Any amendments must be agreed to by the committee; such amendments shall be for clarification or process purposes only.

26.4 APPEAL PROCESS

- (1) The appeal hearing shall be established within a three-month (3) period unless the time-frame is extended by a mutual agreement of the parties concerned or if the Executive Council determines that extenuating circumstances prohibit the establishment of the appeal hearing within the above-noted time-frame.

- (2) If disciplinary action is recommended at the local level, the Local Executive shall submit the committee report at a special or general meeting of the Local and shall be subject to the acceptance of two-thirds (2/3) of those members in attendance in accordance to General Provisions 26.1.1. Should the committee report recommendations not receive two-thirds (2/3) acceptance, rationale for the rejection must be provided.
- (3) If the Local meeting accepts a recommendation of removal from office, the Local Executive shall convey in writing that decision to the member or members concerned together with written notice that an appeal may be submitted to the President within sixty (60) calendar days of receipt of the disciplinary notification.
- (4) The appellant has the right to be heard and to be represented at the appeal hearing.
- (5) The appeal decision of the Executive Council shall be final and binding on all parties to the appeal.
- (6) The UTE shall be responsible for the cost of the hearing and the expenses as follows:
 - (a) each party shall be responsible for his/her own expenses, except that if the appellant's appeal is successful, the appellant may be entitled to reasonable expenses as determined by the Executive Council;
 - (b) the expenses of the representative of the appellant shall be borne by the appellant;
 - (c) each party shall normally be responsible for any expenses incurred as a result of testimony from any witness they wish to call. However, where the appeal is upheld, the appellant may, in extenuating circumstances, request full or partial payment of reasonable expenses incurred by witnesses for the appellant. Such expenses whose reasonableness shall be determined solely by the Executive Council.

26.5 GUIDELINES FOR APPEAL PROCESS

- (1) The appeal process is an informal one so that it is accessible to all members and shall allow the parties involved to be heard. The procedure shall be as follows:
 - (a) The appellant or their representative shall make a presentation to the Executive Council outlining why he/she does not believe the removal from office, or other disciplinary action is justified;

- (b) any witnesses for the appellant shall make a presentation to the Executive Council outlining any role they were involved with which impacted upon the removal from office, or other disciplinary decision;
- (c) the representative from the appropriate Local shall make a presentation to the Executive Council outlining why the action to remove from office, or other disciplinary action was taken;
- (d) any witnesses for the Local shall make a presentation to the Executive Council outlining any role they were involved with which impacted upon the removal from office, or other disciplinary action decision;
- (e) the Executive Council members may ask questions of clarification, which arise from the presentations;
- (f) both the appellant and representative from the Local shall be provided with an opportunity to make a closing summary;
- (g) the Executive Council members shall render a written decision. The President shall forward the decision to the parties involved.

26.6 REMOVAL FROM OFFICE

- (1) Notwithstanding the above, the removal from office provisions of this Regulation shall be deemed to have been complied with by a Local under the following conditions:
 - (a) When provision is made in the Local by-laws for a referendum vote of the membership of the particular constituency represented by the officer proposed for removal from office;

or,

 - (b) When, in the case of an officer who was elected by representatives rather than by direct membership election, provision is made in the Local by-laws for a vote by representatives of the particular constituency represented by the officer proposed for removal from office.

Adopted September 1978
 Amended December 1992
 Amended March 1993

Amended December 1996
 Amended June 2000
 Amended March 2002

Amended July 2005
 Amended June 2006

REGULATION NO. 27

27.1 DESIGNATED EMPLOYEES

- (1) Designated employees who work at a work site where their bargaining group is considered as being on strike shall be required to contribute twenty-five per cent (25%) of their net take home pay earned during this time to the Local fund.
- (2) Designated employees who do not comply with Regulations shall be considered to have contravened the By-laws and shall be subject to disciplinary actions in accordance with By-laws and Regulations.
- (3) Designated members who show proof of paying 25% of salary either to the PSAC National or Regional Hardship funds shall be exempt from Regulation.

27.2 EXCLUDED POSITIONS

- (1) Members who occupy Managerial or Confidential excluded positions on a temporary basis shall relinquish all union positions until such time the members return to their substantive positions.

Adopted March 1993

Amended July 2002

Amended December 1996

Amended September 2007

Amended December 2001

REGULATION NO. 28

28.1 PROTOCOL ON MOURNING

28.1.1 General

The Union of Taxation Employees is a large family that is occasionally touched by death. The death could be that of a family member of an employee, an elected leader, an employee etc. In all cases there is a need and a desire to show some form of recognition and express condolences in some manner. The following outlines what actions shall be taken in the event of a death within the UTE family.

For the purpose of this Protocol, Immediate Family is defined as: father, mother (or alternatively stepfather, stepmother, or foster parent), brother, sister, spouse (including common-law spouse resident with the employee), child (including child of common-law spouse), stepchild or ward of the employee, grandchild, grandparent, grandparent-in-law, father-in-law, mother-in-law, and relative permanently residing in the employee's household or with whom the employee permanently resides.

- (1) Executive Council Member; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. A contribution shall be made to the designated charity (if one is identified) in the amount of one hundred dollars (\$100.00). If no charity is specified, the one hundred dollars (\$100.00) contribution shall be made to the United Way in the deceased's home community. The Executive Committee shall attend the funeral. The Regional Vice Presidents may attend the funeral.

Any staff member of UTE who wishes to attend the funeral service shall be given up to one half day of special leave with pay for attendance at the funeral.

- (2) Former Executive Council Member: A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. If specified by the family, a suitable floral wreath in red and white or a contribution shall be made to the designated charity in the amount of one hundred dollars (\$100.00). The President or their designate shall attend the funeral.
- (3) Current Staff of UTE; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. A contribution shall be made to the designated charity (if one is identified) in the amount of one hundred dollars (\$100.00). If no charity is specified, the one hundred dollars (\$100.00) contribution shall be made to the United Way in the deceased's home community. The President or their designate shall attend the funeral.

Any staff member of UTE who wishes to attend the funeral service shall be given up to one half day of special leave with pay for attendance at the funeral.

- (4) Immediate Family Member of the Executive Council or Staff; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. A contribution shall be made to the designated charity (if one is identified) in the amount of one hundred dollars (\$100.00). If no charity is specified, the one hundred dollars (\$100.00) contribution shall be made to the United Way in the deceased's home community. In the case of the death of a child or spouse, the President or their designate shall attend the funeral.
- (5) Life Member; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. If specified by the family, a suitable floral wreath in red and white or a contribution shall be made to the designated charity in the amount of one hundred dollars (\$100.00). The President or their designate shall attend the funeral.
- (6) Honorary Member; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. A contribution shall be made to the designated charity (if one is identified) in the amount of one hundred dollars (\$100.00). If no charity is specified, the one hundred dollars (\$100.00) contribution shall be made to the United Way in the deceased's home community.

- (7) Local Union Officer; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. A contribution shall be made to the designated charity (if one is identified) in the amount of one hundred dollars (\$100.00). If no charity is specified, the one hundred dollars (\$100.00) contribution shall be made to the United Way in the deceased's home community. The Regional Vice President for the region or their designate shall attend the funeral.
- (8) Former Local Officer; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin.
- (9) Member killed on the job; A card expressing condolences on behalf of the Union will be signed by the National President and sent to the next of kin. If specified by the family, a suitable floral wreath in red and white or a contribution shall be made to the designated charity in the amount of one hundred dollars (\$100.00). The President or their designate shall attend the funeral.
- (10) General; on a case by case basis, the President may decide on an alternate form of acknowledgement other than what is specified above.

Communications:

In order to ensure that UTE can appropriately recognize the death of one of its own it is essential that the President of UTE be advised as soon as it is known. It will be the responsibility of the President to ensure that the appropriate action happens. It is the responsibility of the Local to let the National Office know of the death of one of its officers or Members killed on the job.

It is important to provide the following information to the President as soon as possible:

The name and position held by the deceased;
The name and address of the next-of-kin;
The funeral arrangement including information about the location of the wake and the funeral service; and

The preference of the deceased or the family of the deceased for charitable contributions.

Adopted December 2003
Amended June 2004
Amended July 2005

Amended December 2007

Life Members

June Atkinson
Ray Bailey
Betty Bannon
Jean Bergeron
Marcel Bertrand
Louis Cadieux
Madeleine Caldwell
Allan Robert (Bob) Campbell
Camille Carrier
Linda Cassidy
Mike Chiasson
Godfroy Côté
François Coulonval
Jerry Dee
Arthur Dickinson
Donald Eils
Cathy Figueira
Cathy Figueira
Dave Flinn
Cecil Foley
Gil Folkedahl
Gérard Genest
Gord Hawkins
Gwen Jackson
Frank Lancaster
E.C.H. Leslie
Al Lough
Kent MacDonald
Lorne Menzies

Life Members

(con't)
Harold Neun
Peter Otterdahl
Fred Perrott
Clare Scott

Honorary Members

Ghislaine Audet
Hélène Gagné
Donna Nitz
Lina Ruel
Bob Wallace

Adopted June 1998

RESOLUTIONS OF RECORD

1. BARGAINING DEMANDS

BE IT RESOLVED THAT resolutions that are specific bargaining demands will not be dealt with at triennial conventions.

Adopted July 1981

2. FINANCE COMMITTEE RECOMMENDATIONS AT CONVENTION

Recommendations arising out of the review of the financial statements:

1. More documentation available to delegates in advance of a Convention as follows:
 - a. statements showing the budget, actual and variance amounts with reasons for the differences;
 - b. list of accounts and groupings that relate to the Financial Statements;
 - c. more analysis such as Grievance and Appeal costs in relation to wages, per diem, transportation; etc.
 - d. more analysis of the overall total travel, hotel, etc. in relation to account groupings.
2. Increase rationale for budgetary items (inflation, assumptions).
3. More commentary by the internal auditors.
4. Written policy on reimbursement of expenses.
5. Review of all expense claims paid by at least two elected officials (Vice-president for Finance and the other on a rotating basis).
6. More consistent order re Financial Statements and budget.
7. Regional Conference budget allocation.

Adopted July 1984

Reaffirmed July 1987

3. IDENTIFICATION OF LOCAL NUMBERS

BE IT RESOLVED THAT the Union of Taxation Employees' Locals use their Local' number to the extent that the same number is not assigned to two locals.

Ex. Quebec 10006 for Taxation
Quebec 10006 for Health and Welfare

Adopted July 1984.

4. LEAVE FOR EXECUTIVE COUNCIL MEMBERS

BE IT RESOLVED THAT the President shall take necessary step to ensure that members of the Executive Council obtain the required leave to carry out the business of the Union.

Adopted July 1984

5. COURTESY TO NON-SMOKERS

WHEREAS an overwhelming majority of evidence indicates that smoke, both second-hand and side-stream, adversely affects non-smoking members; and

WHEREAS many members suffer from allergies, bronchitis, asthma and other respiratory ailments, which conditions are aggravated by smoke; and

WHEREAS cigarette, cigar and pipe smoke impart an objectionable odour to all materials and substances with which it comes in contact causing increased dry cleaning costs as well as various other inconveniences to non-smokers; and

WHEREAS cigarette, cigar and pipe smoke hinders the full participation, in certain activities, of the non-smoking members who represent the majority.

BE IT RESOLVED THAT all meetings of the Union including but not limited to: Regional Conferences, Conventions, Union Committee meetings, Executive Council meetings and Presidents' Conferences be designated non-smoking;

BE IT FURTHER RESOLVED THAT in order to accommodate smokers appropriate breaks be incorporated; through the planning process, in the aforementioned meetings; conventions and conferences.

Adopted July 1987

6. BY-LAWS AND REGULATIONS

WHEREAS all members should be able to rely on the By-Laws and Regulations provided to them in their mother tongue; and

WHEREAS there are known discrepancies in the translation of those By-Laws and Regulations; and

WHEREAS the National Office is currently reviewing both the English and French editions to identify and correct all discrepancies in translation.

BE IT RESOLVED THAT no member should be made to suffer in any way for his reliance on the wording of the By-Laws and Regulations printed in his mother tongue; and

BE IT FURTHER RESOLVED THAT once a discrepancy has been identified, that discrepancy shall be corrected to reflect the wording of the original By-Law or Regulation as it was debated and adopted; and

BE IT FURTHER RESOLVED THAT the National Office provides the members with notification of both the discrepancy and the corrected wording and that such notification be considered to be binding on all members from the date of that notification.

Adopted September 1988

7. FEMALE REPRESENTATION

BE IT RESOLVED THAT each Local take into consideration the representation of its women members in choosing its delegates.

Adopted September 1990

8. PRESERVATION OF ENVIRONMENT

BE IT RESOLVED THAT U.T.E. investigate and where possible, adopt policies and practices which would help to curb the destruction of our environment.

Adopted September 1990

9. TRANSLATION OF DOCUMENTS

BE IT RESOLVED THAT the President of U.T.E. obtains from PSAC and Revenue Canada, Taxation official responses in both languages to its bilingual requests without the translation having to be done by U.T.E.

Adopted September 1992

10. EQUAL OPPORTUNITIES COMMITTEE

WHEREAS the Equal Opportunities Committee is responsible for responding to concerns and addressing needs of women, people of racial and ethnic minorities, people with disabilities, lesbians and gay men, and native people; and

WHEREAS the amount of work to be done in these areas is considerable.

BE IT RESOLVED THAT the number of members on the Equal Opportunities Committee be increased to at least six and not greater than eight members; and

BE IT FURTHER RESOLVED THAT the designated groups be represented on the committee; and

BE IT FURTHER RESOLVED THAT the Equal Opportunities Committee meet as a whole, at least four times a year.

Adopted July 1993

11. ACCESSIBILITY AND DISABILITIES

WHEREAS the health and safety of our members concerns all of us;

WHEREAS some facilities used for union functions have not been adapted to all our members needs; and

WHEREAS the accessibility to organized functions is sometimes restricted to those persons with disabilities.

BE IT RESOLVED THAT UTE complete a pre-assessment for accessibility of all facilities and technical aids required prior to the booking of a UTE sponsored event; and

BE IT FURTHER RESOLVED THAT the pre-assessment be completed in consultation with the representative for the people with disabilities on the UTE Equal Opportunities Committee.

Adopted July 1996

12. MEMBERS WITH DISABILITIES

WHEREAS we are made to feel as if we are imposing ourselves on everyone because of our disabilities, be it diabetic, mobility, sight impaired.

BE IT RESOLVED THAT at future conferences and conventions, caucus held for members with disabilities, accommodation must be made in recognition for the need for dietary requirements, medication, mobility assistance, etc. (i.e. diabetics, brain tumour - require medication with or after scheduled meals).

Adopted July 1996

13. UTE EQUAL OPPORTUNITIES CONFERENCE

WHEREAS the concept of Equal Opportunities Conferences is to sensitize members and create awareness; and

WHEREAS larger locals have a larger budget to assist their financing to these events.

BE IT RESOLVED THAT the Equal Opportunities Committee in consultation with the National President be able to transfer funds from those locals who do not utilize the full benefit of their financing to another local.

Adopted July 1996

14. MEMBERSHIP SURVEY

WHEREAS the membership wants to be part of the process to make change, and;

WHEREAS UTE often requests local input via bulletins on various issues.

BE IT RESOLVED THAT UTE encourage all locals to contact their members (i.e. Standing committees, membership meetings, surveys) before replying to an input call.

Adopted July 1996

15. SALARY FREEZE FOR OFFICERS ON FULL TIME ASSIGNMENT

WHEREAS the rates of pay of members of the Union of Taxation Employees are frozen; and

WHEREAS the Union of Taxation Employees must show a great deal of fairness.

BE IT RESOLVED THAT the salary of officers on full-time leave be subjected to the same freeze and that the duration of the freeze be the same as that imposed on members.

Adopted July 1996

16. PRESIDENTS CONFERENCE EVALUATION

WHEREAS several persons comment on the way the President's Conference is operating and that such comments could be useful to improve future conferences.

BE IT RESOLVED THAT the National President bring to the Executive Council meeting following the President's Conference all evaluations received and that a compilation and/or summary of such be prepared for purposes of analysis by the Executive Council so that all suggested improvements be made, as necessary.

Adopted March 1998

17. DONATIONS/SPONSORSHIP GUIDELINES

- (1) Under the line item Donations/Sponsorships:
 - (i) Donations are defined, as monies given which must be helpful to a Community, Organization, Union or Individual;
 - (ii) Sponsorships are defined as monies given to activities; teams or individuals where there are promotional aspects for the Union of Taxation Employees.
- (2) The National President between Council meetings may approve Donations/Sponsorships up to \$500.00 with the agreement of the 1st Vice-President.
- (3) The Maximum sponsorship per request shall be \$1000.00 per year except under exceptional circumstances this may be increased by a two-thirds vote of council.
- (4) Every January a complete list of Donations/Sponsorships will be sent to all locals. (Whom, city and the amount) This would also included any pre approved Donations/Sponsorships for the current year.
- (5) All Donations/Sponsorships cheques will be made out to the Organization, Team, and Individual etc. for whom the amount was approved.

Adopted June 2003

17A) DONATIONS/SPONSORSHIP LINE ITEM

BE IT RESOLVED THAT, starting in 2005, a minimum of \$2000 of the line item Donations/Sponsorships be allocated to Strike Appeals and Holiday Relief Funds; and

BE IT FURTHER RESOLVED THAT if less then the \$2000 has been spent or allocated as of December 1st, that the balance be available to other types of Donation/Sponsorships at the December Executive Council meeting.

Adopted October 2004

18. CCRA - EMPLOYMENT EQUITY

BE IT RESOLVED the Employer be held accountable to provide local Equity Committees a complete and detailed copy of it's Employment Equity goals and objectives by December 31, of the year prior to the beginning of the 3 year plan; and

BE IT FURTHER RESOLVED THAT the National Executive take whatever action that is necessary to ensure the compliance of this provision.

Adopted July 2002

19. CCRA - EMPLOYMENT EQUITY

BE IT RESOLVED THAT all levels of the Union acquire from the Employer their employment equity action plans at least 3 months prior to the initial term of the Employer Employment Equity action plan; and

BE IT FURTHER RESOLVED THAT the Union develop a strategy to ensure the Employer institute its employment equity staffing objectives on a timely basis consistent with the employment equity action plan.

Adopted July 2002

20. INFORMATION PACKAGE

BE IT RESOLVED THAT UTE create an information package which lists the functions of the local and the Component; and

BE IT FURTHER RESOLVED THAT this information package include the names and contact numbers of the local executive officers; and

BE IT FURTHER RESOLVED THAT this information package be provided to all new members as they join the union.

Adopted July 2002

21. INFORMATION PACKAGE

BE IT RESOLVED THAT UTE National Office create an information package that would cover the structure of the Component and it's policies and procedures to help locals answer questions or handle grievances, staffing complaints, etc. – an all around guide to performing union duties; and

BE IT RESOLVED THAT this guide be sent to all locals by December 2002; and

BE IT RESOLVED THAT this guide be updated by the national Office and that amendments be sent to all locals by September of each year after the first issuance.

Adopted July 2002

22. PROTOCOL

BE IT RESOLVED THAT UTE Executive Council develop back to work protocol procedures to be implemented following a strike.

Adopted July 2005

23. BARGAINING DEMAND RESOLUTION

BE IT RESOLVED THAT bargaining demands be received and reviewed by the UTE National Bargaining Committee at any time on a continual basis.

Adopted July 2005

24. JOINT BARGAINING MEETING

BE IT RESOLVED THAT the UTE ask the PSAC to introduce a schedule of meetings of CRA, PSAC and UTE officials to discuss all of the technical aspects involved in preparing bargaining sessions; and

BE IT FURTHER RESOLVED THAT the UTE Executive Council give clear, complete directives as to its expectations and objectives for these meetings; and

BE IT FURTHER RESOLVED THAT union representatives attending these preparation meetings and discussions be: the elected member designated by the PSAC connected with the PSAC/CRA bargaining team and, for UTE representatives, the UTE President and the 2nd Vice-President.

Adopted July 2005

25. PAY AND BENEFITS OF RELOCATING/TRANSFERRING MEMBERS

BE IT RESOLVED THAT UTE take the appropriate steps to ensure the continuation of pay and benefits without disruption for members relocating or transferring within CRA.

Adopted July 2005

26. UNION STRUCTURE

BE IT RESOLVED THAT UTE make all necessary representation upon PSAC to have Local 70035 transferred to the PSAC Quebec structure.

Adopted July 2005