



**EXECUTIVE REPORT**

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**NATIONAL PRESIDENT**

**MARC BRIÈRE**

**UNION OF TAXATION EMPLOYEES**

**NATIONAL CONVENTION**

**JULY 2021 - VIRTUAL**



**2021 NATIONAL TRIENNIAL CONVENTION  
OF THE UNION OF TAXATION EMPLOYEES**

**REPORT OF THE NATIONAL PRESIDENT  
TO THE  
EIGHTEENTH TRIENNIAL CONVENTION (2021)  
OF THE UNION OF TAXATION EMPLOYEES**

Sisters, Brothers and Friends,

This is the first time that I have had the great honour and privilege of presenting my report as National President of our great Union to our National Triennial Convention. It fills me with pride. My report will cover my presidency over the past four (4) years.

With all the events that have marked the daily lives of our members and our union, it is appropriate to look back on this period and look forward, at least for the next two years.

To begin with, you may have noticed that I mentioned that my term of office, which is coming to an end, will have lasted four (4) years instead of three (3) as prescribed in our By-Laws. This is due to the COVID-19 pandemic and its many impacts on the activities of the Public Service Alliance of Canada (PSAC) and all of its parts, including our Component. The PSAC and its Components have had to postpone a number of important events including Local Annual General Meetings, all PSAC Regional Triennial Conventions and the PSAC National Convention as well as Component Conventions for a period of approximately one (1) year. Consequently, the next term of office for all National Officers (Regional Vice-Presidents, Alternate Regional Vice-Presidents, Second National Vice-President, First National Vice-President and National President) of the Union of Taxation Employees (UTE) shall be for a period of two (2) years in order to return to normalcy as of the next cycle. This decision was adopted by the PSAC National Board of Directors following an interpretation of the PSAC Constitution by the Alliance's National President, Brother Chris Aylward.

Under the UTE By-Laws, and specifically By-Law 10, the duties of the President are:

## **DUTIES OF OFFICERS**

### **Section 1 – President**

The President shall:

1. uphold the Constitution of the PSAC and the By-Laws of UTE;
2. represent UTE on the National Board of Directors of the PSAC as required by the Constitution;
3. be responsible to the Executive Committee, to the Executive Council and to the Convention;
4. be responsible for the receipt and keeping of all monies of UTE along with their disbursement under the direction of the Executive Council;
5. preside at all meetings and Conventions;
6. be an ex-officio member of all Committees;
7. ensure that notices and agendas of each Executive Council, Executive Committee meeting, Presidents' Conference and Convention are prepared and circulated in advance;
8. be responsible for the minutes of all meetings of the Executive Council, Executive Committee and Presidents' Conferences and will countersign them along with the 1<sup>st</sup> Vice-President;
9. ensure that copies of minutes of the Executive Council or Executive Committee meetings are sent to each Local within four (4) weeks and ensure that the record of any Convention is sent to each Local within four (4) months;
10. be responsible for the preparation of a complete record of any Convention;
11. ensure that UTE directives, policies and procedures are updated and subsequently forwarded to Locals;
12. make written reports on the administration of the office and on the affairs of UTE to each regular meeting of the Executive Council and to each Convention;
13. be responsible for the administrative management, control and allocation of staff in the National Office;
14. ensure that the National Office provides services in both official languages;
15. discharge all duties and obligations imposed upon them by Convention and/or the Executive Council; and
16. perform all duties that are incidental to the office of President;

While the duties of the President are dictated by our By-Laws, the President also receives direction and/or guidance from the supreme governing body of our organization which is the

National Triennial Convention, as well as from the Executive Council, the Executive Committee, the Locals, the Presidents' Conferences, and the UTE membership.

For the past four (4) years, I have upheld the PSAC Constitution and the UTE By-Laws. On several occasions, I have provided interpretations and rulings on the UTE By-Laws and Regulations. When necessary, I have referred questions to the PSAC National President to obtain interpretations and rulings on the PSAC Constitution and Regulations. I have ensured that all rulings and interpretations have been communicated to those who have raised the issues.

### **PSAC National Board of Directors (NBOD)**

As National President of the Union of Taxation Employees (UTE), I am a member of the PSAC National Board of Directors (NBOD) and it is my duty to represent the interests of our members. The NBOD meets formally three times a year. I have participated in all regular Board meetings. I have voiced my opinions, made comments and demanded answers and commitments on all the important issues and questions that have been discussed. I have voted in accordance with UTE policies and always with the best interests of our members in mind.

Because of the very important issue of Phoenix compensation to our members, the NBOD held multiple special meetings on this subject and I actively participated in all of these meetings.

In addition, the arrival of the COVID-19 pandemic has seriously disrupted the lives of all PSAC members, as well as the rest of the Canadian population. Furthermore, it has forced the Board of Directors to meet informally on a regular basis since the beginning of the pandemic. At first we met several times a week, then weekly. For several months now, the NBOD has been meeting every two (2) weeks to discuss various issues related to the pandemic and its effects on the daily lives of our members. We also deal with other important issues that may arise between regular NBOD meetings.

Our First National Vice-President, Brother Doug Gaetz, was often present at the regular NBOD meetings as an advisor to the National President. He provided me with comments, observations and advice. It is always good to have more than one person at these meetings so that you don't miss out on anything that is going on. Brother Gaetz has also filled in for me on occasion when I was not available to attend a Council meeting. I would like to thank him for his support, hard work and full cooperation.

Our Second National Vice President, Brother Adam Jackson, also attended a few regular NBOD meetings and he also filled in for me when neither I nor Brother Gaetz could be present at a Board meeting. I also want to thank him for his support and for his hard work and great cooperation.

There were many changes at the beginning of the last cycle within the composition of the NBOD, both at the level of the PSAC elected Officers and among the Component Presidents. A nice dynamic and a good spirit of collaboration have emerged and I think this has been very positive for everyone.

The only significant setback was the sudden departure of Sister Magali Picard, who was the PSAC's National Executive Vice-President. Sister Picard was a very dynamic and proactive person who was not afraid to "shake things up" and propose changes to the way the Union operated. She was an inspiration to many members, especially for our Sisters and Aboriginal members. Her departure, for professional and personal reasons, was a huge loss and I was very saddened by it. I wish her the very best in her future endeavours.

### **Component Presidents' Meetings**

At the beginning of my term as UTE National President, I had discussions with my fellow presidents of the other PSAC Components. I suggested that we should ensure that we stay in touch on a regular basis to discuss issues that we have in common, to share best practices and to ensure that we have, as much as possible, a common position on some of the issues being dealt with at the NBoD.

It was agreed to hold meetings on the Monday before the NBoD meetings. In addition, since the beginning of the pandemic, we have held meetings almost every Monday before the informal NBoD meetings.

The Component Presidents' meetings are informal and no minutes are taken at these meetings.

I must say that I am very pleased that this initiative has come to fruition as I believe that it has greatly assisted the Component Presidents in the discharge of their duties. We share a lot of things with each other, a lot of issues that we all face. This is done with the utmost respect for confidentiality. People listen, share, encourage and support each other. A very nice complicity and a great camaraderie has developed. It's a great example of solidarity and teamwork!

### **UTE Committees**

The committees have worked hard to fulfill their mandates and to report back to the membership through the minutes or their reports submitted at the Executive Council meetings. Bulletins and/or memos were always issued in a timely manner to the membership, Locals, Executive Council and Alternate Regional Vice-Presidents. Committees have solicited comments and suggestions from members and Locals to assist them in their work. Most committees are self-governing and their Chairs have had regular discussions with the National President and have kept him informed of any significant developments.

### **PSAC Committees**

Since 2014, I have been sitting on the NBoD Committee on Representation Issues. This committee works to find ways to improve the management of cases that are submitted to the PSAC for adjudication. A lot of work has been done by this committee and many recommendations were submitted to the NBoD which adopted the majority of them. In addition,

the file tracking system was improved as well as the communication with the members. Following a recommendation of the committee, more human resources were allocated to process the files which greatly helped to reduce the processing time.

For the past few years, I have also served on the Social Justice Fund (SJF) Steering Committee. At each of its meetings, the committee reviews all applications received, whether for projects from abroad or to support projects across Canada, and the committee members vote on each application. In addition, there are often urgent requests that come in between committee meetings. The committee also issues letters and sometimes reports to government officials, both here and elsewhere, in support of people who are fighting for justice for those in need or who are oppressed. We also issue public opinions on behalf of the SJF.

Finally, I also sit on the PSAC Holdings Board. This committee makes decisions on various projects of varying sizes concerning the assets of PSAC Holdings. These are mainly maintenance or improvement projects concerning the PSAC building located at 233 Gilmour Street in Ottawa or other buildings that the PSAC leases or owns in different regions of Canada.

### **Executive Council**

Since the beginning of my term, I have reported to the Executive Council on all the important issues and problems that our members and our union have faced. And there have been many!!!

The UTE Executive Council meets at least four (4) times per fiscal year. These regular Council meetings are usually held in March and September just prior to the Presidents' Conferences and in June and December. The June and December meetings are normally followed by the National Union-Management Consultation Committee (NUMCC) meetings.

Before each Executive Council meeting:

- I have ensured that notices and agendas for each Executive Council meeting are prepared and circulated in advance;

At each Executive Council meeting:

- I have chaired all regular and special meetings of the Executive Council;
- I submitted written reports of my administration of the office and the affairs of UTE to each regular meeting of the Executive Council;

After each Executive Council meeting:

- I have ensured that the minutes of all Executive Council meetings are produced and I countersigned these minutes with the First National Vice-President;
- I have ensured that copies of the minutes of the Executive Council meetings are sent to each Local;

## Activities of the Executive Council

The following is a list of **some** of the items that Council has addressed over the past four (4) years:

- It appointed the signing authorities;
- It dealt with unfinished business from the last convention;
- It adopted the appointments to the UTE standing committees;
- It adopted the appointments of auditors for each fiscal year;
- It adopted appointments of equity group members to represent the five (5) equity groups on the National Equal Opportunity Committee;
- It vigorously discussed negotiations with CRA at each of its meetings;
- It regularly discussed staffing issues and the CRA Staffing Redesign project.
- It approved overspending of certain budget line items as necessary;
- It adopted the financial statements;
- It adopted the audited financial statements for each fiscal year;
- It adopted the expense claims over 90 days;
- It adopted the Regional Conferences' budget for each fiscal year;
- It dealt with the reports of the investigation committees;
- It dealt with the trusteeship of Local 10027 in Trois-Rivières;
- It adopted the location and date of the 2020 Triennial Convention (postponed to 2021);
- It adopted the location and date of the 2023 Triennial Convention;
- It adopted several recommendations from the Honours and Awards Committee for the granting and presentation of various awards;
- It adopted proposed changes to some of the UTE Regulations for submission to Convention;
- It made donations to assist Brothers and Sisters on strike or lockout;
- It made extraordinary donations to support organizations that help people in need (e.g., \$5,000 to the *Canadian Red Cross* in the National Capital Region for tornado victims in 2018; \$100,000 to *Food Banks Canada* in 2020; \$22,000 to the *Canadian Red Cross-Stronger Together Fund* for the victims of the Nova Scotia massacre in 2020)
- It provided sponsorships to support organizations working in our communities (e.g. \$1,500 to the Fairmont Château Laurier's "Trees of Hope" event for the Children's Hospital for Eastern Ontario (CHEO));
- It made donations to the Workers' History Museum (WHM);
- It continued to support International Children's Awareness (ICA), both financially and by sending volunteers to work with Major Smith;
- It created two new Locals in the National Capital Region (NCR) to support members more effectively;
- It adopted the recommendation that the Greater Toronto Region Scholarship be renamed the "Linda Collins Greater Toronto Regional Scholarship";
- It adopted the recommendation of the Honours and Awards Committee that the second National Scholarship be renamed the Robert "Bob" Campbell National Scholarship;
- Exceptionally, Council adopted the 2021 budget due to the COVID-19 pandemic and the postponement of the National Triennial Convention;

- It adopted the 2022-2023 budget for submission to convention;
- It supported the *Black Class Action* lawsuit launched on behalf of all Black federal employees against the federal government to remedy the injustices and inequalities they have faced since 1970 and also contributed \$10,000 as a special fund for the *Black Class Action Trust Fund*.
- It adopted the appointments to the Convention Committees;
- It adopted the Terms of Reference of Convention Committees;
- It adopted the Convention Rules of Order;
- It adopted the appointments to the Convention Nomination Committee;
- It adopted the appointments to the Convention Credential Committee;
- It discussed the *Membership assignment to Locals* which is part of the *Guiding Principles and Practices* of the Union of Taxation Employees and approved the establishment by the National President of an Ad hoc committee on this subject to study the matter and make recommendations to the Executive Council.

In addition, a two (2) day training session was offered to Executive Council officers on January 17-18, 2018 to better equip them when giving media interviews. Council also held a special planning session (retreat) on January 19-21, 2018 to identify key issues facing the membership and decide on the union's priorities and key directions for the next cycle.

### **Executive Committee**

The UTE Executive Committee shall meet at the call of the National President and shall normally deal with matters referred to it by the Executive Council or the National President. It may conduct the business of our Union between meetings of the Executive Council.

The Executive Committee shall consist of the following officers: the National President, the two National Vice-Presidents (NVP), and a Regional Vice-President (RVP) who shall rotate for a one-year term.

For the past four (4) years, the members of the Executive Council who have joined me to form the Executive Committee are: the First National Vice-President, Brother Doug Gaetz, the Second National Vice-President, Brother Adam Jackson, and the following Regional Vice-Presidents (in order): Brother Gary Esslinger, Brother Jamie vanSydenborgh, Brother Ken Bye and Brother Cosimo Crupi.

Before each Executive Committee meeting, I ensured that the notices and agenda for each meeting were prepared and circulated in advance.

I chaired all Executive Committee meetings.

After each Executive Committee meeting, I ensured that minutes of all meetings were produced and published. I countersigned these minutes with the First National Vice-President.



## **Activities of the Executive Committee**

The Executive Committee approved the following permanent appointments:

- Sister Sylvie Bastien to the position of Administrative Assistant to the National President;
- Brother Liam Merrigan to the position of Financial Administration Officer;
- Sister Natasha Larose to the position of Administrative Support;
- Sister Carmen Menard to the position of Administrative Assistant to the National President.

The Executive Committee approved the following term appointments:

- Brother Daniel Camara to the position of Executive Assistant to the National President;
- Sister Louise James to the position of Administrative Support;
- Sister Sylvie Bastien to a part-time position of Administrative Assistant to the National President;
- Sister Shirin Amiri to the position of Labour Relations Officer II;

In October 2017, the Executive Committee approved the nominations of the following five (5) Regional Vice-Presidents to join the UTE National Bargaining Committee for the upcoming round of negotiations: Brothers Brian Oldford, Cosimo Crupi, Gary Esslinger, Greg Krokosh and Eddy Aristil.

Finally, the Executive Committee awarded the following members the Marguerite Stonehouse Memorial Scholarships (Labour College of Canada Scholarship) in accordance with UTE By-Law No. 23:

- Sister Crystal Isaac (year 2018);
- Sister Maureen O'Hearon-Lang (year 2019);
- Sister Melissa Arsenault (year 2020).

I would like to take this opportunity to sincerely thank all the officers of the Executive Council who have served on the Executive Committee during our mandate for all the good work they have done and for their excellent collaboration.

## **Presidents' Conference**

Before each Presidents' Conference:

- I have ensured that notices and agendas for each Presidents' Conference are prepared and circulated in advance;

I have chaired all Presidents' Conferences. At each conference, I reported briefly on some of the business of the Executive Council and we dealt with items submitted by the Local Presidents.

The following is a list of some of the items submitted by Local Presidents that have been addressed at Presidents' Conferences over the past four (4) years:

- Service Renewal Update;
- Service Modernization Plan for the Greater Toronto Region;
- Workforce Adjustment (WFA);
- Scholarships;
- Training - Harassment Prevention Awareness;
- Career Leadership Development Program;
- Phoenix pay system and its impacts on our members;
- Training – Union-Management Approach (UMA);
- Chief Shop Steward Symposium;
- Bill C-27 - Amendments to the pension plans for federal public service retirees;
- Discrimination and Harassment Centre of Expertise;
- Carryover and exhaustion of annual leave;
- Integrated Staffing System (ISS);
- Rejection on probation instead of discipline for unauthorized access;
- Dues – Phoenix / PSAC;
- Memorandum of Understanding between CRA and UTE – Temporary Lateral Move to lower levels;
- Revocation of medical and dental benefits while suspended;
- Dealing with security reviews;
- Internal Fraud Hot Line/Snitching;
- Credit checks now being used for Reliability Status after Reliability Status + (RS+) ended;
- Family Related leave;
- Air Canada Promo Code;
- Members being moved to part-time status due to medical accommodation;
- Canada Labour Code Regulation 20 Complaints;
- Media Scan Emails;
- Decision Review;
- Dues Refunds;
- Harassment Sessions at the CRA;
- Students;
- Recreational Marijuana;
- Staffing without process;
- Great-West Life Dental Insurance;
- Use of indirect time codes;
- Discipline Processes;
- Fake CRA phone calls;
- Accommodations;
- Call Centre Assessment and Rehire Tool and Call Centre Assessment Tool;
- Scoring grid;
- Job « Reclassifications »;
- Petition for bargaining and other actions;

- Trust exam workload and possibility of reclassification;
- Overtime / Mismanagement of funds;
- Accountability of senior management;
- Collection of unearned Union Dues by the PSAC;
- Closure of offices due to bad weather conditions;
- Pre-retirement Transition Leave ~ Leave Without Pay (LWOP);
- CVWMS (Collections Verification Workload Management System) & INTEGRAS (Integrated Audit Management System);
- Dues calculator on website;
- Phoenix overpayments;
- Virtual Management;
- Working at Home;
- E-petitions;
- Accommodations (Medical Certificate);
- Service – Front Counter Update;
- Time for Presidents to do union business;
- Missing members, missing money and delegate entitlements;
- Solidarity! With non-unionized workers in our workplaces;
- “Safe Workplaces; Preventing Discrimination and Harassment” joint sessions for CRA employees;
- Significant Local membership gains through Canada Labour Code Regulation XX (workplace violence) complaints;
- Local communications strategies and tools;
- Staffing Re-Design;
- More Info Dumping, Less Consultation;
- Unfair bargaining practices;
- Phoenix Damages;
- Rands;
- Christmas donation to the Ottawa Food Bank;
- Membership assignment to Locals;
- Challenges around “ new hires” and the orientation for these members;
- Signing of membership cards;
- Posting on Bulletin boards...use of employer virtual Bulletin boards;
- Expenses options during the pandemic.

The various UTE committees have reported, made presentations and/or provided updates to participants at each of the conferences.

The following is a list of **some** of the presentations that have taken place at the Presidents' Conferences over the past four (4) years:

- *Social Media* Presentation;
- Violence in the Workplace Update (on two occasions);
- Brainstorming Session (political action);
- Disability Insurance Session;

- Members vs Members - Complaints Procedure;
- Staffing Redesign;
- Procedures in Response to Workplace Violence;
- Call Centre Assessment Rehire Tool (CCART) and Call Centre Agent Assessment Tool (CCAAT);
- *International Children's Awareness (ICA)*;
- Tribute to the late Brother Robert « Bob » Campbell;
- Session on Representing and Advocating against Workplace Anti-Black Racism (full day).

At the Presidents' Conference held in September 2017, I also presented the *Guiding Principles and Practices* of the Union of Taxation Employees along with Shane O'Brien, UTE's Senior Labor Relations Officer.

We have also offered several workshops during the Presidents' Conferences.

The following is a list of **some** of the workshops that have been held at Presidents' Conferences over the past four (4) years:

- In Fighting;
- Chief Shop Stewards;
- Collective Agreement Articles;
- Political Lobbying;
- Compassion Fatigue (full day);

Elections were also held to elect Local Union representatives to the UTE National Standing Committees.

### **Equal Opportunities Conference**

Three (3) regional Equal Opportunities conferences were held in the summer and fall of 2018. They were respectively held in Calgary, Montreal and Toronto. They went well and were a rewarding learning opportunity for many of our members who advocate for equity across the country. The National Equal Opportunities Conference was held in Ottawa in October 2019 and was a great success. The feedback received from participants was overwhelming.

I would like to congratulate and thank all the members of the Equal Opportunities Committee for their excellent work and dedication to our members in the equity groups.

We are an inclusive union and I am very proud of that.

## **National Health and Safety Conference**

The National Health and Safety Conference was held in Ottawa on October 12-14, 2018. The committee worked extremely hard to provide an opportunity for members who advocate for health and safety to share information and obtain a wealth of information to assist them in their work on local committees. The conference was a great success and the participants were very appreciative of all the information they gathered and took back to their workplaces.

I would like to thank all the members of the Health and Safety Committee for their excellent work. Congratulations!

## **Triennial Convention**

Before the Triennial Convention:

- I have ensured that notices and agendas for the convention were prepared and circulated in advance;
- I have ensured that convention committees meet to deal with resolutions submitted for consideration and that the committees make a recommendation of concurrence or non concurrence for each resolution;
- I have ensured that a copy of the budget estimates and a copy of the convention program were sent out in advance.
- I led the discussions regarding the negotiation and signing of a contract with Encore Canada as the service provider for our virtual convention in July 2021.

## **NATIONAL OFFICE**

### **Staff changes**

Over the past cycle, there have been several changes in our staff. Sister Natasha Larose has joined us in an Administrative Support position. Sister Shirin Amiri was appointed to a Labour Relations Officer II position. And Sister Carmen Menard was appointed to the position of Administrative Assistant to the National President. Sister Chantal Beauchamp left us to join the PSAC. Finally, Sister Sylvie Bastien left us to take a well deserved retirement.

### **Conferences**

- Preparation for six (6) Presidents' Conferences including the first ever virtual conference in UTE history in March 2021;
- Preparation to hold four (4) Equal Opportunities Conferences: three (3) regional conferences and one (1) national conference;
- Preparation to hold one (1) National Health and Safety Conference.
- Negotiated and signed a new three (3) year contract with the Delta Ottawa Downtown Hotel.

## Executive Council Meetings

- Preparation for all regular Executive Council meetings and several special Council meetings. Many meetings were held virtually.

## Triennial Convention

- Our convention was rescheduled from July 2020 to July 2021 due to the COVID-19 pandemic and restrictions imposed by public health authorities;
- Negotiated and signed new contracts with hotels, service providers and meeting venues in Winnipeg for our 2023 convention.
- Negotiated and signed a contract with Encore Canada as the service provider for our virtual convention in July 2021.

## Official languages

I have ensured that the National Office provides services in both official languages.

## Communications / Website

We have worked to continue to improve our communications with members over the past four (4) years. **Some** of our activities in this regard include:

- Sending press releases to the media through the PSAC system;
- Producing and issuing several videos for our members in which the National President addresses various important issues;
- The publication and sharing of interviews given by the National President to various media;
- The invaluable work of our Communications Committee;
- The publication of the UTE Union News;
- Issuing news and bulletins on our website as well as on our Facebook page and Twitter account;
- Sending messages directly to our members through our email distribution lists;
- With the help of the PSAC, sending messages directly to thousands of our members asking them to sign and send petitions to their MPs and federal government ministers including the Minister of National Revenue and the President of the Treasury Board;
- Publishing the reports and minutes of all our committees;
- The publication of bulletins for Executive Council meetings, Presidents' Conferences and our other national and regional conferences;
- The regular updating and maintenance of our website.

## Information Technology

- The purchase of a license, the implementation and the use of the Microsoft *Teams* system and *Zoom* platform to hold internal and external virtual meetings and to ensure regular contact between elected officers, between Locals and their RVP's, between

elected officers and National Office staff, between staff members and between Locals and their members with the holding of virtual AGM's. These initiatives have been very successful and have greatly assisted us in continuing to serve our members well;

- Constantly updating our computer and technology needs including the latest security technologies to protect our internal and external Internet communications.

We also replaced all the computers, monitors and printers in the National Office as well as the iPads and cell phones of the Executive Council Officers.

### **Education**

- Developed and implemented a Basic Accounting Course for Locals;
- Continuing education at Presidents' Conferences through presentations and workshops;
- UTE National and Regional training courses;
- Reviewing our training courses and revising them for delivery and facilitation in a virtual environment.

### **Finances**

Several changes and improvements have been made by the Finance Section over the past four (4) years and I fully support these changes. They have helped to make UTE more efficient and effective in its oversight of members' funds and in the responsible management of those funds. I will not detail the changes that were made here as our First National Vice-President, Brother Doug Gaetz, will do so in his report to Convention.

### **Grievances and representation by the National Office**

- Provided representation for hundreds of grievances and significantly reduce backlog;
- Resolved (settle grievances pending adjudication) cases;
- Developed procedures with CRA regarding virtual grievance hearings;
- Provided representation regarding Independent Third Party Reviews (ITPR);
- Held hundreds of meetings with the employer;
- National Office review of all CRA directives, policies, procedures and guidelines.

### **Hearings before the Federal Public Sector Labour Relations and Employment Board (FPSLREB)**

- Significant victories in unfair labor practice complaints and arbitrations;
- Use of employer facilities (bulletin boards);
- Statutory freeze complaints regarding work schedules;
- One-time special leave credit;
- Terminations and reliability checks;
- Pre-retirement leave.

## **Operation of the National Office**

- Developed procedures for working from home, including health and safety protocols following the COVID-19 pandemic;
- Signed a new three (3) year contract with UTE staff, members of the Alliance Employees Union (AEU) Unit V.

## **Addressing important issues with CRA affecting our members**

- Administrative conversion for term employees;
- Telework policy;
- Members "volunteering" to help administer the Canada Emergency Response Benefit (CERB);
- Forced deployment of members;
- Late implementation of Clause 60.01;
- Outsourcing of call center work to respond to taxpayers' calls for emergency benefits;
- Extended hours of work and shift work schedules in the Assessment, Benefit and Service Branch (ABSB) Call Centres and the Collections and Verification Branch (CVB) Debt Management Call Centres (DMCC);
- Staffing Program Redesign;
- Performance Management Redesign.

## **ISSUES**

I would now like to review some of the major issues we have faced since our last convention.

### **Wage reopener clause regarding our previous contract**

On May 3 and 4, 2017, the PSAC/UTE bargaining team met with the employer, the Canada Revenue Agency, to discuss wage increases for 2014 and 2015, as per the collective agreement signed in October 2016. Unfortunately, the parties were unable to reach an agreement, so they had to go to arbitration, as provided for in the contract and the legislation. On January 31, 2018, we presented our arguments before the arbitration board in Ottawa. The binding decision was issued on March 14, 2018 by the Conciliation Board. CRA had 150 days following said decision to issue retroactive payments to our members. My Executive Assistant, Brother Daniel Camara, and I held conference calls with representatives of the employer every two (2) weeks to follow up on this important issue on a regular basis and to ensure that CRA would meet its commitment. This was the case.

### **Collective bargaining**

Our previous contract expired on October 31, 2016. Due to the fact that we had to wait until March 2018 to finally resolve the wage reopener issue regarding our previous contract and the



holding of our Triennial Convention in July 2017, at which time several changes occurred in the makeup of the Executive Council, the latest round of negotiations began a bit late.

In June 2018, the bargaining teams proceeded to exchange their respective packages of bargaining demands. The first bargaining sessions were held July 3-5 and September 11-13, 2018. We held a National Day of Action on November 27, 2018 to show support for our bargaining team. A poster with the slogan "My Contract, My Voice" was distributed at this day of mobilization. Afterwards, talks resumed on December 3-6 of the same year.

Unfortunately, the negotiations did not go as smoothly and seamlessly as we had hoped. As a result, in early 2019, the UTE-PSAC bargaining team was forced to declare impasse and thus move to the next legislated step of requesting a Public Interest Commission (PIC). As a result of this action, the Federal Public Sector Labour Relations and Employment Board (FPSLREB) decided to put our application on hold and instead opted to have the parties return to the bargaining table with the assistance of a federal mediator. We then asked our Locals to circulate a petition and to organize mobilization activities. Those mobilization activities started in February 2019 and continued to happen across the country for a few months. Regarding the petition, we have collected 7580 signatures from our members.

The next negotiation meeting was held on April 2-4, 2019 with the presence of a mediator but it did not lead to more success.

Another bargaining session was held in early May 2019. Given that the employer refused to table their wage offer, despite their negotiator's formal commitment to do so, and still refused to address our members' key concerns, our bargaining team had no choice but to declare impasse once again. As a result, our negotiator contacted the FPSLREB to reactivate our request that a Public Interest Commission (PIC) be established to assist the parties in resolving their dispute.

On May 22, 2019, we launched an email campaign aimed at the Minister of National Revenue to denounce the intransigence of the CRA negotiating team and to ask her to make things happen.

An action plan was developed for the summer of 2019. Speaking notes and a negotiation lobby kit were sent to Locals for distribution.

Here are some of the activities that were suggested:

- to meet with Members of Parliament (MPs) at barbecues;
- to hold luncheon meetings with members;
- to organize demonstrations.

Public Interest Commission (PIC) hearing dates were set for January 6 and 20, 2020.

Following up on the idea presented by Local 20029 (Surrey Tax Centre, B.C.) President, Sister Heather Kenny, at the September 2019 Presidents' Conference, we decided to highlight the fact that on October 31, 2019, it had been three (3) years since our members' collective

agreement expired. We provided our members with a solidarity pin to wear with pride in their workplaces. A document jointly written by our Second National Vice-President, Brother Adam Jackson, and myself also accompanied the pins.

On January 6 and 20, 2020, two days of Public Interest Commission (PIC) hearings were held to allow both sides to present their positions.

Not wanting to sit idly by while waiting for the Commission's recommendations, which were to be made public by the end of March 2020, it was decided to organize strike votes across the country starting the week of February 17. This in order to put more pressure on the employer and to be prepared to use job action, including striking if necessary, in the middle of the personal income tax filing season.

The strike vote sessions went smoothly and the support from our members was absolutely incredible! From the beginning, it was clear that our members were tired of waiting for a new contract and the results of the votes were unequivocal. Unfortunately, the arrival of the COVID-19 pandemic forced us to rethink our plans. With the number of reported cases of coronavirus in Canada increasing at an alarming rate, it was important that the PSAC and its Components take the lead in protecting the health and safety of its members and the Canadian public.

For this reason, and in compliance with the recommendations of local and national public health authorities, the union had no choice but to postpone any activity involving large numbers of members, including strike vote meetings. As a result, on March 13, 2020, the PSAC National President announced the suspension of strike votes until further notice.

On April 30, 2020, the Public Interest Commission (PIC) released its recommendations regarding our contract settlement. The commission sided with the union on several issues in dispute.

On July 14, 2020, following the success of the email campaign with the slogan, "Enough praise, let's bargain now!" as well as discussions between PSAC and Treasury Board officials and my discussions with the Commissioner of the Canada Revenue Agency (CRA), the Agency finally agreed to return to the bargaining table.

On July 25, 2020, after a week and a half of intense negotiations, our bargaining team reached a tentative agreement with CRA for a new five (5) year contract from November 1, 2016 to October 31, 2021. This was a great victory for our members who went above and beyond to help Canadians during the pandemic. Our team was able to achieve wage increases averaging 2.07% and better working conditions without any concessions.

The ratification package was then made available to our members and the ratification process for the tentative agreement was held entirely online from August 24 to September 29, 2020.

The new collective agreement became effective on November 13, 2020 when both parties officially signed it.

I would like to take this opportunity to thank all the members of our bargaining team for their great dedication to our members and for their hard work.

I would also like to thank all of our Locals for their continued support and success in mobilizing our members by organizing a multitude of activities throughout this long and difficult round of bargaining.

Of course, I would like to thank all of our members for their commitment and continued unwavering support of our bargaining team. Without the unwavering support of our members, none of this would have been possible. Much of the credit goes to them.

### **Greater Toronto Area Service Modernization Plan**

In June 2017, the CRA Ontario Region announced the Greater Toronto Area (GTA) Service Modernization Plan. This plan caused a lot of concern among our Greater Toronto Region (GTR) members and we shared their concerns about it. Through the collective action of our members and GTR Locals, the relevant Regional Vice-Presidents and the UTE National Office, as well as our colleagues in the AFS group, the CRA reconsidered its initial position and agreed to engage in a meaningful consultation process in which our members were able to provide details about their personal situations and their ideas and suggestions.

On December 22, 2017, we announced that we had been successful in making significant changes to the employer's plan for delivering the GTA organizational model. We were able to persuade the employer not to displace employees until the year 2021, with the exception of those who would volunteer. And we were able to persuade the employer to revisit the situation in 2021 before forcing employees to move. Alternatives such as teleworking, virtual reporting, flexible hours and flextime, among others, will be explored. The employer has also agreed that there will be no workforce adjustment and no job losses as a result of this initiative.

I would like to thank the Greater Toronto Region Locals and the Regional Vice-Presidents involved, Brothers Ken Bye and Cosimo Crupi, who were instrumental in mobilizing around this issue and bringing it to the attention of the UTE National office. We would especially like to thank all the GTR members who became active in this campaign. Without your efforts and support, this campaign would not have been as successful.

### **Problems related to the Phoenix payroll system**

Since April 2016, and throughout the last four (4) years, the Phoenix payroll system has created all sorts of problems for our members. Although the percentage of employees who have had a payroll problem has been lower at the Canada Revenue Agency than elsewhere in the federal public service, it has still been very painful for our members and has caused them a lot of trouble and unnecessary stress. In 2017, the situation was still quite difficult, but things slowly improved in 2018 and the following years. Regardless, this federal government fiasco is unacceptable and many of our members and former members continue to suffer the consequences to this day.

## **The "CAS Can Do It" Campaign**

Tired of having payroll problems through the Phoenix system, we decided to propose a temporary solution to the CRA and the federal government in the late spring of 2018 by launching the "CAS Can Do It" Campaign. UTE strongly believed, and still believes, that there is a better way to pay CRA employees, through its own Corporate Administrative Systems (CAS). For over 20 years, the CRA has used the CAS for payroll administration, without major complications, and has paid its 44,000 employees accurately and on time. Offloading 44,000 employees, including two collective agreements, would have reduced the burden of the Phoenix system for the rest of the public service.

To implement this change, federal legislation would have been required. During the summer months of 2018, we asked members and their families to sign cards for Prime Minister Trudeau, asking that his government allows to have CAS pay CRA employees directly. We lobbied CRA senior management and the Minister of National Revenue as well as other government ministers.

Through the hard work of our Local union representatives, we were able to collect over 14,000 signatures.

At a rally held in Ottawa on Friday, September 28, these cards were delivered to the office of the Prime Minister, the Honourable Justin Trudeau. That same day, we also met with the Parliamentary Secretaries of the Revenue Agency, Public Services and Procurement and Treasury Board. We made the case for why the government should have provided the human and financial resources to allow the CRA to develop CAS to replace Phoenix.

Despite the fact that the government refused to move forward with our proposal, I am extremely proud of the mobilization of our members and the outstanding work of our Locals. In addition, the Political Action Committee did an excellent job and I would like to thank Brothers Jamie vanSydenborgh, Committee Chair, Cosimo Crupi, Committee VCo-Chair, André Michaud, Committee member, and Daniel Camara, Committee Technical Advisor, for their incredible professionalism and dedication.

I am convinced that this campaign was not in vain. Indeed, it has allowed us to make ourselves better known to several ministers and parliamentary secretaries of the government and even to the Prime Minister's office. They were able to see the seriousness of our approach during our discussions. In addition, it should be noted that the government has chosen the company SAP to develop the next generation payroll system that will replace the Phoenix system. During our campaign, we promoted CAS, a system used by the Canada Revenue Agency and the Canada Border Services Agency, which has proven itself. This system is a product of the company SAP.

## **Temporary incentives for CRA compensation advisors**

On February 8, 2018, UTE announced that it had entered into a Memorandum of Understanding (MOU) with the CRA to provide temporary incentives to compensation advisors in the SP-04,

SP-05, and SP-06 groups and levels working in the Compensation Client Service Center to recognize their incredible work since the implementation of the Phoenix payroll system, which resulted in a large increase in requests for intervention from compensation employees. The incentives went into effect on January 30, 2018, the date the MOU was signed, and were effective until June 30, 2018. These temporary incentives were then renewed for an additional period.

### **Term Members and Annual Leave Credits**

After our previous collective agreement was signed, we learned that the addition of clauses 34.03 and 61.04 had a negative impact on some of our members. Term members who had completed their term of employment and were eligible for rehire were informed that their vacation leave credits would be reduced to zero as of the start date of their new term of employment and that past service would not be counted towards their vacation leave credits.

Upon taking office as National President, I contacted the employer to rectify this unfair situation.

After numerous discussions with senior management, we were pleased to announce on February 9, 2018 that we had reached a Memorandum of Understanding (MOU) with the CRA. The agreement was retroactive to November 1, 2016. Under the MOU, continuous and discontinuous service for term members who received severance pay would be counted toward earning and calculating annual leave credits.

### **Renewal of commitment to the Union-Management Philosophy**

On May 14, 2018, Professional Institute of the Public Service of Canada - Audit, Finance and Science Group (PIPSC-AFS) President Doug Mason, Canada Revenue Agency (CRA) Commissioner Bob Hamilton, then-CRA Deputy Commissioner Nancy Chahwan, and I met in Ottawa to renew our commitment to the Union-Management Philosophy, commonly referred to as the Union-Management Approach (UMA). The philosophy underscores the importance we place on harmonious and transparent union-management relations and the practical application of an informal approach to conflict resolution.

### **Quebec Single Tax Return: The "Don't be fooled by the Conservatives" campaign**

On August 12, 2019, we launched one of the largest political action campaigns in UTE history to denounce the Conservative Party of Canada's push for a single tax return in Quebec, administered by Revenu Québec, should they win the federal election in the fall of 2019.

The campaign included social media, print and radio ads. For the first time in our history, we used the services of a specialized marketing firm.

I also took the opportunity to hit the road in Quebec to give multiple radio, television and print interviews.

Our campaign was a great success and I would like to thank all the members of the Political Action Committee for their excellent work in organizing and implementing this campaign.

I would also like to thank all the Locals and our members, especially those in Quebec, who mobilized in such a great way to protect the jobs of more than 4,000 of our members working in Quebec and hundreds of others working across the country.

### **Quebec Single Tax Return: Bloc Québécois Bill C-224**

In January 2021, the Bloc Québécois introduced Bill C-224, once again attempting to introduce a single tax return in Quebec and administered by the Quebec government. The bill made its way through second reading in the House of Commons and was sent to the House of Commons Finance Committee for consideration.

Faced with this new threat, I immediately contacted the PSAC President to ask him to hold a meeting as soon as possible with the leader of the New Democratic Party (NDP), Jagmeet Singh. Brother Aylward and I met with Mr. Singh on February 4<sup>th</sup> to discuss the situation. I took the opportunity to request to appear before the committee to express our concerns about the inevitable job losses that would follow the implementation of such an initiative.

I appeared before the committee on February 23<sup>rd</sup>. During my appearance, I reiterated our concerns about this bill and the job losses in the federal public service that would result. I also explained to the members of the committee that it was premature to want to implement a single income tax return in Quebec since the two tax laws, the federal and the Quebec government's, have many important differences in their respective policies.

On March 2, 2021, we were pleased but also surprised to learn that Bill C-224 had been defeated at another meeting of the Standing Committee on Finance and would therefore not return to the House of Commons for third reading.

This is good news. However, I would like to mention that this is unfortunately only a temporary postponement. Indeed, it is certain that the Bloc Québécois will come back with this idea during the next federal election campaign, which should be held before the end of 2021. Furthermore, one of the Conservative Party members sitting on the Standing Committee on Finance, Luc Berthold, confirmed to me that his party would also propose the implementation of a single tax return in Quebec in order to simplify the life of Quebecers. However, he declared that his party wanted to avoid job losses and committed to discuss their proposal with us before the elections if time permits. We have no objection to discussing it with him without committing ourselves in any way.

### **Agreement between UTE and CRA regarding Phoenix Damages**

On July 24, 2020, I was pleased to inform our members that the Union of Taxation Employees - Public Service Alliance of Canada (UTE-PSAC) and the Canada Revenue Agency (CRA) had signed an agreement that agrees to implement, in the same manner and within the same

timeframe, the terms of the Memorandum of Understanding (MOU) regarding damages caused by the Phoenix payroll system, entered into by the Treasury Board of Canada and the Public Service Alliance of Canada.

PSAC successfully negotiated Phoenix Damages that are significantly better than the employer's agreement with other federal bargaining agents. Indeed, PSAC had rejected the government's offer in 2019 - five days of cashable leave. We had denounced this offer protesting that high earners would be advantaged compared to those earning lower wages. The current agreement provides eligible PSAC members with a fair and equitable lump sum payment of up to \$2,500.

Unfortunately, the Canada Revenue Agency has given an interpretation that the lump sum payment is taxable. We waited several months for Treasury Board to provide a joint statement of facts with PSAC so that CRA could correct its interpretation of the Phoenix settlement. However, Treasury Board has refused to do so. The CRA had no choice but to maintain its decision that the award was taxable.

The agreement between Treasury Board and the PSAC is clear. It reflects the magnitude of the nightmare our members have experienced. The amount negotiated was to compensate our members for the "stress, frustration, pain and suffering" caused by the Phoenix fiasco and the late implementation of collective agreements. This type of compensation is not usually taxable, as the courts have repeatedly ruled. It is unacceptable that Treasury Board refuses to substantiate these facts.

One thing is certain, we will not go down without a fight!

PSAC is exploring all legal avenues available to us to appeal the Revenue Agency's decision.

At the time of writing, Treasury Board has not yet activated the claims process for all former members and retirees who are still waiting to receive their fair share of the Phoenix Damages. Once again, Treasury Board's attitude in this matter is deplorable and unacceptable. These people deserve to be treated with respect. New developments are expected shortly in this file.

### **Change to the administrative conversion of term employees**

Along with the successful conclusion of our last collective agreement negotiations, we took advantage of this leverage to reach a historic agreement for our union members. After nearly 20 years of fighting, we finally succeeded in obtaining that the administrative conversion of term employees to indeterminate (permanent) status be done after three (3) years of continuous service instead of five (5) years as it had been the case since 2007. Thanks to the Memorandum of Understanding signed with CRA on August 18, 2020, this has finally become a reality! The change became effective as of November 1, 2020.

I am particularly proud of this accomplishment. Because I know how much our term members live with the constant insecurity of not having job security. And this greatly affects their personal lives and plans for the future. I have been discussing this very important issue with CRA

Commissioner Bob Hamilton on an ongoing basis for the first three (3) years of my term! A little more and he could have filed a harassment complaint against me on this issue! LOL. I also spoke regularly with many managers in the Agency. Not only in Ottawa, but across the country. And I've talked about it several times with the Minister of National Revenue.

And, to make sure that my message was clear, I advised the Commissioner that we would not sign an agreement at the bargaining table without also getting the change to the administrative conversion of term employees.

### **Racism and discrimination**

In the wake of the events of 2020 that shook the United States and Canada, and in particular the tragic deaths of Black people George Floyd, Breonna Taylor and Regis Korchinski-Paquet and Aboriginal people Chantel Moore and Rodney Levi during police interventions, many of our members are feeling pain, grief and anger and are rightly demanding change to stem the tide of these appalling scourges of racism, systemic bias and discrimination. All of this deeply affects our communities here in Canada and around the world.

Over the past few months, I have had several discussions with senior CRA officials as well as with the Chair of our Equal Opportunities Committee, Sister Linda Koenders, regarding this extremely sensitive issue. I have decided to mandate the Committee to consult and dialogue with our members to gather information and propose concrete actions to address racism, systemic bias and discrimination at the CRA and within our union.

In September 2020, the committee launched a survey of our members focusing on racism, discrimination and harassment. This allowed our members to share their own personal observations and provide us with specific areas to focus on. We asked them to provide feedback on their experiences at work, in the union and in their personal lives.

In the meantime, the PSAC has undertaken to implement several important changes to address systemic racism and discrimination. Among the initiatives that have been undertaken is a series of trainings on anti-black racism for members of the National Board of Directors (NBoD). I enthusiastically participated in these trainings and I must say that it was very interesting and most importantly, very educational.

I then asked the PSAC to provide similar training sessions to the Executive Council Officers. The sessions are currently underway and the response from Executive Council has been extremely positive.

On May 13, 2021, the Chair of the Equal Opportunities Committee extended an invitation to our members who are part of the Black community. We are looking for members who would like to serve on an all-Black member working group to help the committee understand and examine the issues that affect them and propose avenues for solutions. The committee has received applications and is in the process of finalizing the selection of members to serve on the working group.



In the coming months, further action will be taken in collaboration with the PSAC, which has just finished developing an action plan on racism. This plan was unanimously adopted by the NBoD in late May.

### **COVID-19 pandemic**

Of course, I cannot ignore the outbreak of the COVID-19 pandemic and the terrible impact it had on the general population and also on our members and our organization.

By mid-March 2020, the pandemic had the following effects:

- Daily discussions with the employer to ensure the health and safety (OHS) of our members working on the employer's premises;
- Establishment of new OHS protocols;
- Increasing the number of telework agreements to allow the vast majority of our members to telework from home;
- Suspension of UTE-PSAC strike votes;
- Postponement and cancellation of the March and September 2020 Presidents' Conferences;
- Postponement of the March 2020 Executive Council meeting;
- Suspension of other union activities, including the holding of Annual General Meetings of our Locals. These have resumed since February 2021.
- Discussions with the employer regarding critical services and telework exceptions;
- A call to all employees by the employer to "volunteer" to act as temporary Call Centre agents to help administer the Canada Emergency Response Benefit (CERB) and other emergency benefits put in place by the federal government. UTE was supportive of this initiative with certain conditions. Moreover, it had to be on a voluntary basis and employees had to be able to provide these services remotely. In addition, acting pay and other such issues had to be taken into account if employees were performing duties at a higher level.
- Postponement of the UTE Triennial Convention from July 2020 to July 2021;
- Consultations regarding CRA's Business Continuity Plans;
- Deployment of members by CRA. UTE worked with the employer but also vigorously defended the rights of our members.
- In response to the devastation caused by the pandemic in communities across the country, the UTE Executive Council decided to make an extraordinary donation of \$100,000 to Food Banks Canada to assist those in dire need.
- Consultations regarding the CRA's Strategic Business Resumption Plan;
- Discussions with the employer to ensure that all our members receive a written or electronic copy of the new collective agreement.

### **Hiring of 2,000 new call center agents**

In February 2021, the Minister of National Revenue announced the hiring of 2,000 new call center agents to assist the millions of taxpayers who received Canada Emergency Benefits in preparing their tax returns.

The Union of Taxation Employees (UTE) welcomed this news because our members working in the Agency's call centers were in dire need of these reinforcements. They have been dealing with an unprecedented number of calls from taxpayers dealing with the tax implications of the pandemic. The CRA's announcement is a victory for UTE, which has long advocated for more call center agents to better serve Canadians.

### **Outsourcing to a third party private sector service provider**

However, the Minister also announced in February 2021 that the CRA had contracted out to a private sector third party service provider, the U.S. company Maximus, to respond to general taxpayer inquiries regarding emergency benefits. UTE and PSAC protested this privatization of public sector jobs and immediately denounced this unfortunate and ill-advised decision.

We believe that a private sector call center can only answer half of taxpayers' questions and will send people back to our call centres. Adding to these concerns are the privacy risks for Canadians who have to talk to an external provider about their taxes.

The Minister of National Revenue has indicated in a press release and reiterated to us in a meeting that this contract will not be renewed when it expires at the end of August. We acknowledged her commitment but insisted that she keep her word.

### **Launch of the "Uncover the Costs" campaign**

Not wanting to take any chances, UTE and PSAC jointly launched the "Uncover the Costs" campaign in March 2021 to publicly denounce this privatization of federal public sector jobs.

The campaign is designed to demonstrate that there is no benefit to the CRA from this contracting out of jobs. It is far more expensive and less efficient to contract out than to do the work in-house. Trained federal public servants who report directly to the Canadian government are the ones who must answer the public's questions about emergency benefits.

We have asked our members to take immediate action by sending an email to their Member of Parliament as well as to the Minister of National Revenue and the President of the Treasury Board to demand that these jobs be returned to the public service.

Again, I would like to thank the members of the UTE Political Action Committee for their excellent work on this other issue. It is safe to say that they have been hard at work for the past four (4) years!

In the meantime, I continue to have discussions with the Office of the Commissioner of the CRA and the Office of the Minister of National Revenue to ensure that the contract is not renewed at the end of the summer.

### **Internal Conflicts**

One of the biggest problems we face is internal conflicts, mainly at the Local level. Since the beginning of my involvement with our union, I have seen a lot of internal strife. My predecessors have spoken about this on numerous occasions, particularly at the Presidents' Conferences. I have done the same. We also held a workshop on this topic at a conference. We have offered and provided mediation in some cases. Nothing seems to work. The rivalries continue and this problem, a real plague, has gone on for far too long. It seems that some people are unable to work together with their colleagues for the good of our members and put their personal interests ahead of everything else. There are communication problems between some people. And there is too often a lack of respect between people, whether it is between members of the same local executive or between union representatives and some members.

This is disappointing and extremely frustrating.

Some people act selfishly or out of personal vengeance. These actions are not dignified and have an extremely negative effect on the level of trust members have in their union. These actions are unacceptable. They undermine our efforts to mobilize members and diminish the value of our work in their eyes. We need to do better. We need people to talk to each other to resolve their differences.

This has to stop! Our members deserve better.

### **Other issues**

Here are some other important issues that have marked the last cycle and on which we have had to intervene and take action:

- Return of the service counters to the CRA. We presented our case to the Commissioner and the Deputy Commissioner. We then did the same with the Minister of National Revenue, the Honourable Diane LeBouthillier. We were making progress on this file but the pandemic put an end to discussions on this subject. To be continued.
- UTE members not assigned to a local;
- Temporary Lateral Moves (TLM) to a lower level;
- Phoenix: PSAC change file and recovery of unpaid dues;
- Phoenix: employer recovery of overpayments and salary advances;
- Call centre agents who received incorrect instructions from the employer in April 2020 and as a result provided incorrect information to some self-employed individuals for a few weeks regarding their eligibility for the Canada Emergency Response Benefit

(CERB). I have been out in the media defending our members and forcing the CRA and the federal government to acknowledge its mistakes in this matter.

- Interpretation and implementation of the new Clause 60.01 of the new collective agreement;
- Corrective action following the delay in the implementation of the new Clause 60.01 of the new collective agreement;
- Staffing Program Redesign;
- Performance Management Redesign;
- Implementation of the new collective agreement for our members and former UTE members including retired employees;
- Extended hours of work and shift work schedules in the Assessment, Benefit and Service Branch (ABSB) Call Centres and the Collections and Verification Branch (CVB) Debt Management Call Centres (DMCC);

## **ACKNOWLEDGEMENTS / THANKS**

I would like to begin by thanking our members for their unwavering support of their union. It cannot be said enough, but it is the members who are the real strength of a union. Without their commitment and support, we, their union representatives, could accomplish nothing.

I would also like to sincerely thank and congratulate our members for the outstanding work they do every day in the service of Canadians. And I must acknowledge their fantastic work since the beginning of the pandemic. The federal government has given the Canada Revenue Agency an extremely difficult and demanding mandate to help Canadians by administering multiple emergency benefits in addition to regular tax programs. And the Agency turned to our members to fulfill that mandate. Our members did more than deliver. They have excelled and this is to their credit. I believe it was because of this exceptional work that we were able to secure such a good contract in the midst of a pandemic.

During my tenure, I have visited several CRA offices and attended many of our Locals' Annual General Meetings (AGMs). These are special moments that I greatly appreciate. It is a real privilege to meet with the presidents and other local executive representatives and stewards on a more personal level than at a Presidents' Conference or convention. The annual general meetings are particularly rewarding as they give me the opportunity to hear first hand what the members think and where they want their union to go. Listening to the membership is the very foundation of our union's strength. That's why I also appreciate the opportunity to make office visits. This allows me to promote the AGM and meet with members who unfortunately cannot attend.

Whether it's at AGMs, employer's offices, events or conferences, it is always a pleasure for me to discuss and exchange with the representatives of our Locals. They are our eyes and ears on the ground. They are directly involved in the workplaces and interact with the members on a daily basis. We owe them a lot of respect. I want to thank you all for the good work you do and for your continued and outstanding commitment to our members and our union. For many

members, you are the face of the union. You represent us on a daily basis. Not the National President, but you, our local representatives.

I would like to extend my warmest thanks to all our local representatives. You have my appreciation and gratitude.

I would now like to thank all the Officers of the Executive Council. Since my arrival in Ottawa, I have had the opportunity to work with many people on different Councils. Each Executive Council has its own dynamics. This last one is no exception.

In this last term, I have had the opportunity to work closely with some great people. Given the nature of our work and the responsibilities we have, there are times when we disagree on an important issue or topic. Although they all have strong opinions and ideas, this has not prevented us from being respectful in our discussions and deliberations and I want to thank them for that. They like to debate and defend their ideas, and that's fine. But they are also able to compromise and ensure that we always work together for the well-being and best interests of our members. One thing is certain, they are all very dedicated people. They do not count their hours and are always available to help our Locals provide the best possible service to our members who so richly deserve it.

I would like to say that I have learned a lot from them and it has made me a better person and a more seasoned union leader.

I would like to take this opportunity to thank all of them for their hard work, their great collaboration and for the solidarity they have shown. Thank you for your friendship and for the great camaraderie that has animated us over the past four years. I wish each and every one of you all the best for the future and I thank you again for all you have done for our members and our union.

And I want to wish Sister Linda Koenders the most wonderful retirement. Enjoy it Linda! You have earned it.

I would also like to thank all the staff at the National Office for their unwavering support, professionalism and hard work. They bring a wealth of knowledge to the National Officers and all our representatives in the country and I am sincerely grateful to them.

The National Office staff is not only there to assist the union representatives but also to respond to the needs and requests of our members. They provide a wealth of information or refer them to the right people. Whether it is our communications, computer systems, finances, direct assistance to members by our Labour Relations Officers or our Administrative Support staff, National Office employees are there to ensure that the work gets done and that our union provides a high quality of service.

I would like to say to the UTE employees that I greatly appreciate all the good work they do and their support in achieving our goals as an organization and I am extremely grateful. We have a great group of employees and we need to tell them that and show our appreciation and gratitude.

By the way, I am extremely pleased that we signed a new contract with our employees last spring. The contract runs until March 18, 2024.

I would also like to take this opportunity to extend a special thank you to Sister Sylvie Bastien and Brothers Daniel Camara and Shane O'Brien. Sylvie has been my administrative assistant since I became President. She retired but came back to help me out until I could find a replacement. Sylvie finally left at the end of April to enjoy a well deserved retirement. Thank you for everything Sylvie and I wish you a wonderful and long retirement.

Daniel, Shane and Sylvie have always been there for me. They have been a great help and support to me and their contributions over the past four (4) years have been many and very important. Without them, I simply could not do my job. I thank you from the bottom of my heart.

Now I want to thank some very important people in my life. I am talking about my family. I am very proud of my sons Simon and Mathis. Simon has grown into a young man who is taking his place in life and he continues to amaze me because he is ingenious and so much better at building or fixing things than I am. Mathis is now a young teenager. He is smart and curious and has an amazing sense of observation. He is my morning sunshine. My wife Claudine, who has been enduring me for almost 25 years now (lol), gives me total support so that I can devote myself to my passion which is to serve our members and make the world a better place. Without them, I would not be able to do what I do and devote myself to it completely. I want to thank them from the bottom of my heart. I also want to thank my mom for her understanding because she doesn't see her only son as often as she would like because of all my professional activities. I love you very much mom and thank you for your support. And I have a special thought for my father, a former trade unionist, who watches over me from up there.

In closing, I must say a few words about our former National President, Brother Robert "Bob" Campbell. Bob spent over 42 years as an activist in our Union. He served at all levels of our organization. He has always been there for the members. He has helped a multitude of union representatives with his vast experience and valuable advice.

When I came to Ottawa as UTE's First National Vice-President, Bob took me under his wing and helped me greatly. I learned a lot from him and I will be forever grateful.

Bob retired at our last Triennial Convention held in Ottawa in July 2017.

Together with his wife Gesine, he began to enjoy a retirement that he had certainly earned. He was beginning to finally think about himself and enjoy this new chapter in his life.

Unfortunately, life decided otherwise and Brother Campbell left us for a better place on November 10, 2019.

The Executive Council attended his funeral to show him, his wife and his family our respect and affection.

We had planned to honor Brother Campbell's memory at the March 2020 Presidents' Conference but the advent of the COVID-19 pandemic delayed our plans. We finally presented

a tribute to Bob at the Presidents' Conference held virtually in March 2021. It was an emotional moment that many will never forget.

Bob, you are gone too soon. Thank you again for all you have done for our members and for building our great union. May you rest in peace dear Brother.

My best wishes and prayers go out to the love of his life, Gesine Campbell, his beloved daughter Angela Campbell, and all of Bob's family and friends. I wish you well.

## **CONCLUSION**

This represents a fairly comprehensive picture of my work, the activities I have been involved in, and the challenges we have faced over the past four (4) years.

As you can see from my report, we have been very busy this past cycle. Whether it is the members, the Local Executives and Stewards, the Executive Council Officers, or the National Office staff, everyone has been working very hard. Everyone has had to deal with the upheaval caused by the COVID-19 pandemic.

The last round of bargaining was long and hard. But we have once again demonstrated our resilience and determination to get what is right for our members. We mobilized in a remarkable way and demonstrated that if we all work together, we can achieve great things.

When I began my term as National President, I made certain commitments.

First, with the help of the Executive Council, to increase the visibility and stature of our union and to improve our communications, not only with our members, but also with the public and the media. We also wanted to raise awareness among Canadians about the quality services that our members provide and the vital contribution they make to our communities.

I think it is safe to say that this goal has been largely achieved. On numerous occasions, we have produced videos and issued messages to our members. We have issued press releases to the media. We have launched several political action campaigns. I have also given multiple interviews to various media, both print and electronic (radio and television), in both English and French. Other Officers of the Executive Council have done the same. We met with members of different political parties, parliamentary secretaries, ministers. And we were directly involved in the last federal election campaign in 2019 and in particular on the issue of the single tax return in Quebec.

In addition, with the advent of the pandemic, the work of our members was highlighted as never before. Their incredible response in administering emergency benefits to help Canadians in a time of crisis unprecedented in modern history has allowed us to highlight to the general public and the media the importance of our contribution to our communities across Canada. From that perspective, we couldn't ask for more.

Another commitment was to improve our relationship with the CRA senior management. Indeed, when I took over as President, it became clear to me that the relationship between the two parties was not at its best and that I had to work to improve the situation in the best interest of our members. Without going into detail, I can say that we have succeeded in achieving our goal. Nothing is perfect. However, I must say that communications between the parties are much more productive. The employer is consulting with us more frequently on a multitude of issues that are important to our members. We have reached numerous Memorandums of Understanding with the Agency's senior management. I have kept the lines of communication open with the Commissioner's office and the Minister's office. Our labour relations department has also worked with the employer's representatives and there is a lot of respect between them. When we sometimes disagree on an issue, the parties acknowledge it while remaining respectful. And when we decide to take strong action, the employer knows that we are just doing what we are supposed to do - defending our members and their interests!

Another commitment was to strengthen solidarity within UTE and the labour movement, in order to better defend our members against the attacks of the government and their right wing allies. I sincerely believe that we can say here again: mission accomplished. Indeed, our members showed exemplary solidarity throughout the last round of bargaining. They supported their bargaining team in a remarkable way. In addition, the members gave us tremendous support during the strike vote sessions.

Solidarity within UTE is alive and well. We are stronger and more united than ever. But we must not let our guard down. We must continue to work together tirelessly to continue to earn the trust of our members and to demonstrate again and again to the employer and the federal government that we are a force to be reckoned with and respected.

But what does the future hold? What do we need to improve?

There are certainly many challenges ahead. Just think of the next round of collective bargaining. It certainly won't be easy again. We will certainly be trying to further improve the working conditions of our members, protect their jobs and make improvements in the area of work-life balance. Teleworking will be a very important issue as well as the right to disconnect after our members' scheduled work hours.

Issues of racism, discrimination and harassment are increasingly becoming societal issues that affect us all. Not only will we need to intensify our efforts to ensure that our members can work in workplaces that are healthy, fair and equitable for all, but we must also look inward to make our union more inclusive. This work has already begun over the past few months, but much more needs to be done.

We will also need to remain vigilant about the privatization of public services. In recent months, UTE has joined the PSAC in denouncing the CRA's decision to contract out call center jobs to the private sector. The PSAC will continue to mount an aggressive campaign on this issue for the entire federal public sector and UTE has already decided to join this broad campaign with the participation of our Brothers and Sisters from other PSAC Components.



We will certainly need to continue to engage in active political action and political lobbying of decision-makers. We will need to continue to be visible in the media when necessary.

For the past four (4) years, I have had the pleasure and privilege of representing our great and beautiful Union and its thousands of members as your National President. It has been a real honour. I believe I have done a good job. In any case, I can tell you that I really care about the rights and interests of our members and I have given it my all and I am proud of it.

Of course, I was not alone. I was fortunate to be able to count on many competent and dedicated people. You know I'm talking about you: the Officers of the Executive Council, the representatives of the Locals and the staff of the National Office. Without you, nothing would have been possible. Thank you all for your friendship and support!

I would like to thank you for allowing me to hold this position when I was elected at the last Triennial Convention.

I still have the passion to continue to fight alongside you.

With the experience I have gained during my current term of office, I humbly offer my services to continue to proudly represent you as the National President of the Union of Taxation Employees.

If the Convention delegates so decide, I will be very pleased to serve you again in this position for the next two (2) years.

Long live UTE, the best Component in the PSAC!

Respectfully submitted and in solidarity,

Marc Brière  
UTE National President