REGULATIONS
UNION OF TAXATION EMPLOYEES

(Updated JUNE 2026)

Table of Contents

REGULATION NO. 1 - STRUCTURE 1
REGULATION NO. 2 - CREATION OF NEW LOCALS 2
REGULATION NO. 3 - COMMITTEES 3
REGULATION NO. 4 - CONVENTION COMMITTEES 5
REGULATION NO. 5 - UNFINISHED CONVENTION BUSINESS 7
REGULATION NO. 6 - UTE DELEGATES TO PSAC CONVENTIONS 8
REGULATION NO. 7 - REGIONAL OR INTER-REGIONAL CONFERENCES 8
REGULATION NO. 8 - DUTIES OF VICE-PRESIDENTS 11
REGULATION NO. 9 - DUTIES OF THE ALTERNATE REGIONAL VICE-PRESIDENTS 12
REGULATION NO. 10 - COLLECTIVE BARGAINING PROCEDURES 13
REGULATION NO. 11 - GRIEVANCE REPRESENTATION POLICY 15
REGULATION NO. 12 - STAFFING 16
REGULATION NO. 13 - REIMBURSEMENT OF EXPENSES 16
REGULATION NO. 14 - CORPORATE CREDIT CARD 24
REGULATION NO. 15 - FUNDING FOR NON-UTE EVENTS POLICY 24
REGULATION NO. 16 - LOCAL LOAN POLICY 25
REGULATION NO. 17 - COMPUTER LOAN POLICY 26
REGULATION NO. 18 - ALTERNATE LOCATION FUND 27
REGULATION NO. 19 - LOCAL TRANSLATION FUND GUIDELINES 28
REGULATION NO. 20 - MEMBERS WITH DISABILITY 29
REGULATION NO. 21 - FAMILY CARE EXPENSES 30
REGULATION NO. 22 - TERMS AND CONDITIONS FOR THE POSITION OF THE ELECTED PAID OFFICERS 31
REGULATION NO. 23 - MARGUERITE STONEHOUSE MEMORIAL SCHOLARSHIPS (Labour College of Canada Scholarship) 35
REGULATION NO. 24 - HONOURS AND AWARDS 36
REGULATION NO. 25 - TRUSTEESHIP 46
REGULATION NO. 26 - DISCIPLINE PROCEDURES 46
REGULATION NO. 27 - ESSENTIAL SERVICES EMPLOYEES 54
REGULATION NO. 28 - PROTOCOL ON MOURNING 55
REGULATION NO. 29 - DONATIONS/SPONSORSHIP GUIDELINES 57
REGULATION NO. 30 - MEMBERSHIP APPRECIATION FUND 58
REGULATION NO. 31 - GUIDELINES FOR FUNDING POLITICAL ACTION/CAMPAIGNS 59
LIFE MEMBERS 61
APPENDIX " A "- RESOLUTIONS OF RECORD 62
1. BARGAINING DEMANDS 62
2. FINANCE COMMITTEE RECOMMENDATIONS AT CONVENTION 62
3. COURTESY TO NON-SMOKERS 63
4. BY-LAWS AND REGULATIONS 63

5. FEMALE REPRESENTATION 64
6. PRESERVATION OF ENVIRONMENT 64
7. TRANSLATION OF DOCUMENTS 64
8. EQUAL OPPORTUNITIES COMMITTEE 64
9. ACCESSIBILITY AND DISABILITIES 65
10. MEMBERS WITH DISABILITIES 65
11. UTE EQUAL OPPORTUNITIES CONFERENCE 65
12. MEMBERSHIP SURVEY 66
13. SALARY FREEZE FOR OFFICERS ON FULL TIME ASSIGNMENT 66
14. PRESIDENTS CONFERENCE EVALUATION 66
15. CRA - EMPLOYMENT EQUITY 66
16. CRA - EMPLOYMENT EQUITY 66
17. INFORMATION PACKAGE 67
18. INFORMATION PACKAGE 67
19. PROTOCOL 68
20. BARGAINING DEMAND RESOLUTION 68
21. JOINT BARGAINING MEETING 68
22. PAY AND BENEFITS OF RELOCATING/TRANSFERRING MEMBERS 68
23. UNION STRUCTURE 69
24. UTE EVENT – UNION LWOP 69
25. NATIONAL POLICY ON LANGUAGE 69
26. AIR CARRIER 69
Appendix “B” CONVENTION FINANCE COMMITTEE RECOMMENDATIONS OF RECORD 70

REGULATION NO. 1 - STRUCTURE

For the purpose of these By-Laws, the following localities are prescribed:

(1) Atlantic Region; comprised of the St. John's (90001), Charlottetown (90002), Sydney (80004), Saint John (60005), Halifax (80003), Bathurst (60006), Moncton (60008), St. John's Taxation Centre (90000) and Summerside (90006) Locals;

(2) Québec Region; comprised of Québec (10006), Trois-Rivières (10027), Shawinigan (10005), Chicoutimi (10110) and the Jonquière (10004) Locals;

(3) Montréal Region; comprised of Montréal (10008), Rouyn-Noranda (10009), Montérégie South Shore (10017), Sherbrooke (10007), Laval (10028), and Outaouais (70035) Locals;

(4) National Capital Region; comprised of Ottawa West (70000), Ottawa Centre (70004) and Ottawa East (70001);

(5) Northern and Eastern Ontario Region; comprised of Belleville (00012), Kingston (00011), Peterborough (00008), Sudbury (00042) and Thunder Bay (00020) Locals;

(6) Southwestern Ontario Region; comprised of Windsor (00018), London (00017), Kitchener (00015), Hamilton (00014) and St. Catharines (00016) Locals;

(7) Greater Toronto Region; comprised of Toronto Centre (00013),Toronto East (00001), Toronto West (00051) and Barrie (00052) Locals;

(8) Prairie Region; comprised of Winnipeg (50021), Regina (40022), the Winnipeg Taxation Centre (50031) and the Winnipeg Compensation Client Service Centre (CCSC) (50032) Locals;

(9) Rocky Mountains Region; comprised of Southern Alberta (30024), Edmonton (30025), Saskatoon (40023) and Calgary Call Centre (30022) Locals;

(10) Pacific Region; comprised of Vancouver (20027), Penticton (20026), Victoria (20028), Fraser Valley TSO (20007), Surrey (20029), Prince George (20002), Kelowna (20003) and Pacific Region Call Centre (20050) Locals.

Adopted November 1966 / Amended February 1977 / Amended September 1978 / Amended August 1981 / Amended March 1982 / Amended July 1984 / Amended July 1987 / Amended September 1987 / Amended September 1989 / Amended December 1989 / Amended December 1990 / Amended October 1991 / Amended December 1992 / Amended March 1993 / Amended July 1993 / Amended September 1994 / Amended June 1995 / Amended December 1996 / Amended March 1997 / Amended September 1997 / Amended June 1998 / Amended July 1999 / Amended September 1999 / Amended June 2000 / Amended September 2001 / Amended March 2003 / Amended December 2003 / Amended March 2004 / Amended June 2004 / Amended June 2005 / Amended December 2005 / Amended March 2006 / Amended December 2006 / Amended December 2007 / Amended

December 2009 / Amended December 2010 / Amended July 2011 / Amended June 2012 / Amended September 2013 / Amended December 2013 / Amended June 2014 / Amended March 2016 / Amended December 2016 / Amended September 2018 / Amended December 2018 / Amended September 2019 / Amended September 2024 / Amended December 2024 / Amended September 2025

REGULATION NO. 2 - CREATION OF NEW LOCALS

2.1 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.

2.2 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 percent (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) For the purpose of this regulation, affected members are defined as the members who will form the new local;

(4) The Regional Vice-President of the region shall be present to supervise the vote;

(5) The Regional Vice-President shall confirm the validity of the vote to the Executive Council;

(6) The ballot shall clearly express the question on the formation of a new Local;

(7) The Executive Council shall approve the formation of a new Local by simple majority vote; and

(8) 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.

2.3 EXCEPTION

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.

2.4 DIVISION OF FUNDS

(1) The funds on deposit of the existing Local shall be divided on a pro-rata share based on the number of members going to the new Local from the existing local;

(2) The amount of funds on deposit will be determined by the Regional Vice-President responsible for the existing Local, in consultation with the existing Local President; and

(3) The month in which the Executive Council approves the establishment of the new Local is the month in which the amount of funds on deposit will be considered for distribution to the new Local.

Adopted September 1997 / Amended March 2000 / Amended March 2002 / Amended September 2005 / Amended July 2011 / Amended December 2013 / Amended September 2014

REGULATION NO. 3 - COMMITTEES

(1) There shall be fourteen (14) Standing Committees:

(a) Bargaining, By-Laws, Staffing, Technological Change, Health and Safety, Equal Opportunities, Well-Being, Finance, Honours and Awards, Workforce Adjustment, Communications, Political Action, Call Centre and Union Management Approach (UMA).

(b) Each Standing Committee, with the exception of the Bargaining Committee, Staffing Committee and Workforce Adjustment Committee (WFA) will have one (1) President's Representative. The Bargaining and WFA Committees will each have two (2) President's Representatives; one from a TSO and one from a TC. The Staffing Committee will have three (3) President's Representatives; one from a TSO, one from a TC and one from a Call Centre. All Presidents' Representatives shall be elected in accordance with By-Law 8 Section 1 (g).

(c) For the purpose of voting for these positions, the following Locals are considered to be Tax Centres:

Summerside 90006
St. John's 90000
Surrey 20029
Jonquière 10004
Shawinigan 10005
Winnipeg 50031
Sudbury TC 00042
Winnipeg Compensation Client Service Centre 50032

(d) For the purpose of voting for the Call Centre positions, the following Locals are considered to be Call Centres:

St. John's TSO 90001
Saint John 60005
Montreal 10008
Hamilton 00014
Ottawa East 70001
Calgary Call Centre 30022
Edmonton 30025
Pacific Region Call Centre 20050
Surrey TC 20029
Shawinigan TC 10005

(2) There shall be Ad Hoc Committees as they are required.

(3) Meetings will normally be held in the National Capital Region.

(4) A minimum of one Executive Council Officer shall sit on each Committee.

(5) When a Committee Chairperson is unable to fulfil their duties for a temporary period of time the President shall:

(a) have the authority to appoint the other Executive Council Officer sitting on the Committee as the Interim Chairperson; and

(b) assign the Chairperson's Alternate RVP to the Committee for the same period of time.

(6) If the position of Local President's representative on a Committee becomesvacant, that position shall be filled in accordance with By-Law 8, Section 1 (1) (g) (v).

(7) Each Committee shall meet at the call of the Chairperson or the Interim Chairperson a minimum of once in a three (3) year term.

(8) The Chairperson or the Interim Chairperson 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 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 **/** Amended July 2011 **/** Amended September 2012 **/** Amended December 2013 **/** Amended July 2014 **/** Amended December 2014 / Amended June 2015 **/** Amended December 2016 **/** Amended September 2017 **/** Amended December 2018 **/** Amended December 2019 **/** Amended December 2024/ Amended March 2026

REGULATION NO. 4 - 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) The President shall recommend delegates to be assigned to each Convention Committee subject to the approval of the Executive Council.

(5) 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.

(6) 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.

(7) The President shall have the sole authority to allocate convention resolutions to convention committees.

(8) Terms of Reference:

(a) The Committees will recommend concurrence or non-concurrence to the delegates of all resolutions placed before them. Unanimous recommendation shall be recorded when such is the case;

(b) The Committee shall not themselves originate or include in their report any new resolutions;

(c) Each Committee shall produce a written report;

(d) All decisions of the Committees shall be by majority vote, with the chairperson having a deciding vote in case of a tie;

(e) The Committees may recommend the combination of two or more similar resolutions into one resolution and shall themselves produce the recommended wording of the composite resolution;

(f) The Committees may recommend concurrence on one or two or more similar resolutions and the others voided on the grounds that their full intent is embodied in the recommended resolutions;

(g) The Committees may recommend the separation of resolutions into two or more resolutions, and shall themselves produce such divided resolutions;

(h) The Committees shall not, in any combination, separation, rewording of resolutions, or production of composite or divided resolutions, in any way change, diminish or expand the full intent and thrust of the original resolutions so affected.The Committee shall be permitted for clarity and translation purposes only (in consultation with the submitting local) to reword resolutions, provided that such rewording does not diminish or expand the full intent and thrust of the original resolution;

(i) The Committees shall clearly identify all original resolutions that have been combined, divided or embodied in resolutions;

(j) When a resolution affects the work of another Committee, immediate liaison should be established with the other Committee to advise accordingly; and

(k) The Committee chairperson will present to convention, resolutions in order of priority as concurred in by Committee members. Such a priority should considerrecognition of those resolutions which were 'dissent' recorded.

Adopted June 1989 **/** Amended December 1996 **/** Amended March 2002 / Amended June 2002 **/** Amended July 2005 **/** Amended July 2011 **/** Amended December 2013 **/** Amended June 2014 **/** Amended December 2016 **/**

REGULATION NO. 5 - 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 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 - 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 - REGIONAL OR INTER-REGIONAL CONFERENCES

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) In the event of a labour dispute that results in additional expenses related to an approved regional event in respect to travel and related costs, the region will be eligible to request a subsidy up to a maximum of $500.00 per delegate.

The Regional Vice-President requesting this subsidy must provide to the National

President for review and approval, in accordance with UTE Regulation 13, details itemizing the additional costs including but not limited to, airfare, mileage, accommodations, per diems or loss of salary.

(6) The Vice-Presidents shall be entitled to attend regional or inter-regional conferences in which their Local is entitled to participate, and to attend any other Regional or Inter-regional Conference if invited by a participating region.

(7) 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.

(8) If the requirements of 7.1 (7) are not met, the President shall not consider any additional advances under this Regulation.

(9) 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 REGIONAL DISCRETIONAL FUNDS

(1) A maximum amount of ten per cent (10%) of the region's yearly allocated budget may be used for discretional spending, subject to the approval of the majority of the Locals in the region.

(2) All requests for spending must have approval of the National President or in their absence, the 1st Vice-President.

7.3 GUIDELINES FOR REGIONAL EDUCATION BUDGETS

(1) The regional education budget is divided equally among the ten regions.

(2) For a region 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 full, in part, in combination of the approved courses and/or workshops provided at Presidents' Conferences listed in 7.3.6.

(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:

(6) (a) UTE courses/workshops approved by Council:

- Grievance Handling Course;
- Local Officers Course;
- Staffing Course;
- OFL Return to Work Course;
- PSAC Convention Preparation Course
- PSAC Convention Procedures Course
- PSAC Duty to Accommodate Course;
- Workshop on Developing Membership Activism;
- Workshop on Drafting Resolutions
- Workshop on Local By-Laws;
- Workshop for Local Treasurers; and
- Workshop on Performance Management; and
- Basic Accounting Course for Locals
- The Mental Health First Aid course presented by the Canadian Mental Health Association
- Talking Union Basics Course
- This is Your Brain on Chronic Stress: Navigating burnout and overload in high pressure roles *
- The Things We Carry: Reducing moral stress in union work *
- The Stress Toolkit for Union Reps: Simple strategies for challenging situations *

*These Courses are limited to two (2) per calendar year at Regional-Interregional Conferences

(b) Modules of the PSAC Local Officer Kit as follows:

1.3, 1.4, 2.3, 2.4, 2.5, 2.9 and 3.1

(i) If the education portion of a regional session lasts a full day or more, they may expend fifty (50) % of the expense from their education budget.

(ii) If the education portion of a regional session lasts at least half (½) day, they may expend twenty-five (25%) of the expense from their education budget.

(7) (a) when planning a Regional or Inter-regional conference that includes a training element or module not listed as an approved course as shown above. The RVP will meet the requirement to access their regional education fundsif approved by the President; and

(b) the RVP requesting approval for training not listed above must provide information to the President, including but not limited to the following: overview of the training to be provided, length of the module and subject matter before the approval can be granted.

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 / Amended March 2009 / Amended June 2009 / Amended July 2011 / Amended June 2013 / Amended July 2014 / Amended September 2014 / Amended June 2016 / Amended December 2016 / Amended December 2019 / Amended December 2021 / Amended March 2024 / Amended September 2025

REGULATION NO. 8 - 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 each Local at least once in each year and to attend membership appreciation events if requested by the Local 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 Local Presidents and/or Local Executives when requested or when deemed necessary. Direction may also be given by the Executive Council or President;

(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 (2) weeks prior to an Executive Council meeting, written report of their activities, expenses incurred, agenda items including motions rationale and where applicable, supporting documentation; and

(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 President.

Adopted 1970 **/** Amended December 1975 **/** Amended March 1978 **/** Amended September 1978 **/** Amended August 1981 **/** Amended September 1986 **/** Amended July 1987 **/** Amended July 1990 **/** Amended September 1992 **/** Amended December 1996 **/** Amended September 2002 **/** Amended December 2007 **/** Amended July 2008 **/** Amended June 2009 **/** Amended July 2021 **/**

REGULATION NO. 9 - DUTIES OF THE ALTERNATE REGIONAL VICE-PRESIDENTS

The Alternate Regional Vice-Presidents:

(1) assume the duties of the Regional Vice-Presidents in their temporary absence or incapacity;

(2) assist or replace Regional Vice-Presidents on request;

(3) serve on Committees when appointed;

(4) perform such services within the region as the Executive Council may direct;

(5) may attend an Executive Council meeting held at the same time as a Presidents' Conference for a maximum of six (6) meetings, during the course of their mandate and that they be entitled to reimbursement of one additional day off for loss of

wages in accordance with Regulation 13.8.1;

(6) may attend all regional meetings and Presidents' Conferences to which they are not already delegates;

(7) submit 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

(8) perform other related duties as required.

Adopted March 1982 **/** Amended September 1986 **/** Amended July 1990 **/** Amended December 1992 **/** Amended December 1996 **/** Amended June 2000 **/** Amended July 2002 **/** Amended July 2005 **/** Amended September 2008 **/** Amended December 2021 **/** Amended August 2023 **/**

REGULATION NO. 10 - COLLECTIVE BARGAINING PROCEDURES

10.1 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 shall be an ex-officio member of the National Bargaining Committee and the PSAC/ UTE Negotiating Team.

(4) The 2nd Vice-President is also a member of the PSAC National Strategy/Strike Co-ordinating Committee (NSCC).

10.2 STANDING BARGAINING COMMITTEE

10.2.1 Composition

This Committee is made up of:

(1) the 2nd Vice-President who is Chairperson of the Committee;

(2) the Regional Vice-President appointed by the Executive Council who is the Co-Chairperson of the Committee;

(3) two (2) Local President representatives, one representing Tax Services Offices and another representing Tax Centres.

Total Committee members four (4).

10.2.2 Duties and Responsibilities

The Committee:

(1) solicits, receives and organizes demands from Locals for the National Bargaining Committee;

(2) prepares the UTE program of demands and forwards them to the PSAC;

(3) submits bargaining demands for the program of demands, subject to the approval from the Executive Council.

10.3 NATIONAL BARGAINING COMMITTEE

10.3.1 Composition

This Committee is made up of:

(1) Four (4) members of the Standing Bargaining Committee;

(2) Five (5) Regional Vice-Presidents as appointed by the Executive Committee:

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;

(c) prior to sharing the final program of demands with all Locals, provides Locals that submitted demand(s) a brief rationale for any demand(s) from that Local that are not included in the final program of demands.

(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-Chairperson 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-Chairperson of the Standing Bargaining Committee.

10.4.2 Duties and Responsibilities

The Team represents UTE members and protects their interests during bargaining meetings with PSAC and employer representatives.

Adopted March 1976 **/** Amended February 1979 **/** Amended June 1980 **/** Amended February 1981 **/** Amended August 1981 **/** Amended March 1982 **/** Amended March 1985 **/** Amended September 1986 **/** Amended March 1987 **/** Amended June 1989 **/** Amended July 2005 **/** Amended July 1990 **/** Amended March 1992 **/** Amended July 1993 **/** Amended September 1995 / Amended December 1996 **/** Amended December 1999 **/** Amended June 2000 **/** Amended August 2000 **/** Amended March 2002 **/** Amended March 2003 **/** Amended December 2007 **/** Amended September 2009 **/** Amended December 2013 **/** Amended July 2014 **/** Amended December 2016 **/** Amended March 2026

REGULATION NO. 11 - GRIEVANCE REPRESENTATION POLICY

11.1 GRIEVANCE STEPS 1ST & 2ND LEVELS

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.

11.2 GRIEVANCE STEP 3RD LEVEL

Representation and costs involved in providing representation at the 3rd level:

(1) 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

(2) 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;

(3) 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.

11.3 GRIEVANCE STEP 4TH LEVEL

Representation and costs involved in providing representation at the 4th level shall be the responsibility of the UTE National Office.

11.4 GENERAL

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 - 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 - REIMBURSEMENT OF EXPENSES

13.1 REIMBURSEMENT OF EXPENSES

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

13.2 PER DIEM

Executive

(1) National Officers, when working on union business authorized by UTE outside their home metropolitan area shall be paid a per diem as per 13.2.1 (5) to cover the costs of meals and incidental expenses. This amount shall be paid to those on authorized UTE business and not otherwise compensated by UTE for the dayof departure from their home up to and including the day of return(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 LabourConvention, 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.

(2) 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.

(3) 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.

(4) Officers of the Executive Council shall be entitled to reimbursement of necessary meals in accordance with 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.

DAILY		
(a)	Breakfast	35 $
(b)	Lunch	50$
(c)	Dinner	65 $

	Total	150 $

13.2.1 Members

(1) (a) Members of UTE who are not Officers of the Executive Council shall be entitled to receive a per diem as per 13.2.1 (5) while on union business authorized by UTE and not otherwise compensated by UTE outside their home metropolitan area or while attending a Presidents' Conference or any other UTE Conference within their home metropolitan area. 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.

13.2.2 Exceptional Circumstances

(1) When it is determined by the UTE National President that in-person conferences and/or conventions cannot take place due to natural disaster, labour dispute, pandemic or other unforeseen circumstance as decided by the aforementioned authority,

(a) That the conference and/or convention not take place over the weekend or paid holidays.

(b) In rare occasions where a meeting must take place over the weekend, delegates shall be paid a stipend equal to full day's per diem for Saturday, Sunday or holiday on which the meeting is in session.

13.3 ADVANCES

(1) Officers of the Executive Council shall not obtain more than three (3) advances at the same time unless it has been authorized by the 1st Vice-President.

(2) 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.

(3) 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.

(4) 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 Flex 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. 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.

(3) 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 2 times the Flex Class Airfare without receipt. The intent of the 2 times Flex Class 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 thePresident or in their absence the 1st Vice-President.

(3) 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 Flex Class 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 LOCAL OBSERVER STIPEND FOR PRESIDENTS CONFERENCE

(1) Notwithstanding By-Law 8 Section 1 (1) (j), a Local that brings an observer to a Presidents' Conference will, upon completion of the required documentation, be entitled to one (1) observer stipend of up to the lesser of either seven hundred and fifty dollars ($750.00) or the actual expenses incurred. In the event that locals send additional observers this will not be considered in the calculation of expenses incurred.

(2) The above-mentioned expense claim must be accompanied by all required documentation and/or receipts and be received by the National Office within ninety (90) days of the close of business of the Presidents' Conference.

13.7 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 National President, the 1st Vice-President or the 2nd Vice-President**,** the authority to approve expense claims.

(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

13.8 DAY OFF

Officers of the Executive Council or their alternate when required to attend shall be entitled to reimbursement of one additional dayfor loss of wages, if loss incurred, to a maximum of six (6) days per year when they:

(1) attend UTE Executive Council followed by a Presidents' Conference; or

(2) attend a UTE National Committee meeting preceded or followed by a UTE Executive Council meeting; or

(3) attend a UTE National Committee meeting preceding or following a UTE Executive Council meeting and a Presidents' Conference; or

(4) attend UTE Executive Council or a UTE National Committee meeting preceding or following a Conference or a Convention that lasts more than six (6) consecutive days.

13.9 GENERAL

13.9.1 Non-Commercial Accommodation Allowance

(1) The President or 1st Vice-President may approve the use of non-commercial accommodation for authorized UTE business. In the absence of the President and 1st Vice-President, the 2nd Vice-President may approve the use of non-commercial accommodation for authorized UTE business. If approved, an allowance of fifty dollars ($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.

13.9.2 Incidental Allowance

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 twenty dollars ($20.00) a day, excluding the days of travel. A full per diem will be applicable on the days of travel.

13.9.3 Receipts

(1) The following receipts shall be attached to the expense claims:

(a) cost of hotel paid;
(b) cost of airfare 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.

13.10 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) Travel Grants: A subsidy provided by UTE to Locals to cover air transportation costs but does not include ground transportation such as taxi, kilometers to and from the airport and/or parking.

(2) Ground Transportation: This would include costs for taxis to and from your home to the airport, bus or train station. This would also include mileage and/or parking to and from the departure point if using a personal vehicle. At destination, the ground transportation would include taxis to and from the airport or parking if using a personal vehicle, except when a travel grant is received. For additional costs prior approval must be received from the President or 1st Vice-President.

(3) Travel by Automobile: The President or 1st Vice-President must approve the use of a personal vehicle. The exception is members attending a UTE event where a travel grant has been provided. The use of a personal vehicle will be reimbursed at the UTE kilometers rate or the Flex Class Airfare without receipt, whichever is lowest. The reimbursement of expenses for the use of rental cars must have prior approval and must be done on a practical and economic basis.

(4) Parking: See Ground Transportation above.

(5) Travel: All travel must be pre-approved by the President, or in their absence, the 1st Vice-President. The actual cost paid for expenses will be reimbursed as per the By-Laws and Regulations.

(6) Per Diem: Is set as per Regulation.

(7) Accommodations: Hotel expenses should be the most practical and economical rates available for the applicable area of the country.

(8) Family Care: Family care will be reimbursed as per Regulation.

(9) 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 CRA 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, examples include bell person at hotels; not included, tips at restaurants.

(10) Executive Council Miscellaneous:

(a) Laundry: Reasonable amounts can be expensed for laundry charges for extended stays seven days (7) or due to short time frames between trips or if the expenses have been pre-approved for exceptional situations.

(b) Briefcases: An Officer of Executive Council is entitled to a briefcase and replacement when necessary (approx. one hundred and fifty dollars $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 Officer of Council is given the use of a cell phone, UTE will reimburse approved cell phone accessories (i.e. case, hands free etc.)

(e) Computer Accessories: As each Officer of Council is given the use of a Laptop computer, UTE will reimburse 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: Officers of Executive Council (excluding the President, 1st Vice-President and the 2nd Vice-President) may use an administration day to complete union work, if approved by the President or the 1st Vice-President.

(j) Residence Expense: Officers of the Executive Council (excluding the President ,1st Vice-President and the 2nd Vice-President) shall receive twice yearly a residence expense to be paid in the months of June and December an amount of $135.00 per month.

(k) A Stipend: Officers of the Executive Council shall receive twice yearly a stipend to be paid in the months of March and September in the amount of one hundred and fifty dollars ($150.00) per month.

Adopted September 1986 **/** Amended December 1986 **/** Amended March 1988 **/** Amended June 1988 **/** Amended September 1989 **/** Amended July 1990 **/** Amended December 1990 **/** Amended December 1992 / Amended March 1993 **/** Amended December 1996 **/** Amended March 1997 **/** Amended July 1999 **/** Amended June 2000 **/** Amended March 2001 **/** Amended December 2001 **/** Amended March 2002 **/** Amended June 2002 **/** Amended July 2002 **/** Amended September 2002 **/** Amended December 2002 **/** Amended June 2003 **/** Amended December 2003 **/** Amended June 2004 **/** Amended December 2004 **/** Amended July 2005 **/** Amended September 2005 **/** Amended June 2006 **/** Amended September 2006 **/** Amended June 2007 **/** Amended March 2009 **/** Amended December 2009 **/** Amended June2012 **/** Amended December 2013 **/** Amended September 2014 **/** Amended December 2014 **/** Amended June 2015 **/** Amended September 2016 **/** Amended June 2017 **/** Amended March 2018 **/** Amended October 2020 **/** Amended July 2021 **/** Amended December 2022 **/** Amended August 2022 **/** Amended March 2024 **/** Amended March 2025 / Amended June 2025

REGULATION NO. 14 - CORPORATE CREDIT CARD

(1) Executive Council Officers 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 2020 **/**

REGULATION NO. 15 - FUNDING FOR NON-UTE EVENTS POLICY

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. In the absence of either the President or 1st Vice-President, the 2nd Vice-President shall replace the absent officer. Such approval shall be reported at the next Executive Council meeting. Such approval shall not unreasonably bewithheld.

(c) All documentation regarding the event must be received prior to approval in (a) or (b) above.

(3) Once the event has prior approval, the member may submit their request for funding directly tothe Regional Vice-President who shall forward it to the 1st Vice-President or in theirabsence 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 them and/or other UTE members and the topics covered.

15.2 GENERAL

(1) This policy does not cover attendance at Conventions.

(2) No one event may exceed ten thousand dollars ($10,000.00).

Adopted March 1998 **/** Amended September 1998 **/** Amended December 2001 **/** Amended July 2005 **/** Amended June 2006 **/** Amended March 2025

REGULATION NO. 16 - LOCAL LOAN POLICY

16.1 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 ($100,000.00) in outstanding loans to Locals.

16.2 TERMS AND CONDITIONS FOR A LOAN

(1) The minimum monthly amount of a loan repayment is one hundred dollars ($100.00). 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 Guaranteed Investment Certificate (GIC) rate at the time of the loan.

16.3 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 - COMPUTER LOAN POLICY

17.1 POLICY

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.

17.2 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 Statements.

(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.

17.3 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 Guaranteed 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. In the absence of either the President or 1st Vice-President, the 2nd Vice-President shall replace the absent officer.

Adopted December 1997 / Amended March 2000 / Amended March 2002 / Amended December 2002 / Amended March 2025

REGULATION NO. 18 - ALTERNATE LOCATION FUND

18.1 ALTERNATE LOCATION FUND POLICY

(1) Locals having members who report to work 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 for each of its remote locations.

(2) A budget of five thousand dollars ($5,000.00) per year shall be allotted for this fund for each distinct location that qualifies per 18.1.1.

18.2 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, AGMs held in a Hybrid format and any other reasonable situation.

(5) When the funds are to be utilized by Local Executives to visit a location, UTE will fund two (2) members of the Local Executive to visit the location. The Local will be reimbursed in the same manner as per Paragraph 18.2(3).

Adopted March 2000 / Amended December 2001 / Amended June 2002 / Amended July 2002 / Amended September 2003 / Amended March 2017 / Amended September 2024

REGULATION NO. 19 - LOCAL TRANSLATION FUND GUIDELINES

The five thousand dollars ($5,000.00) 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 one thousand dollars ($1,000.00) 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 - MEMBERS WITH DISABILITIES

20.1 MEMBERS WITH DISABILITIES

(1) UTE shall establish an assistance fund for Locals to ensure that members with disabilities are informed about union activities and given access to them.

(2) A budget of ten thousand dollars ($10,000.00) per year shall be allotted for this fund.

(3) Financial assistance shall be defined as: charges for any accommodations to allow members with disabilities to participate in activities.

(4) Union activities shall be defined as the following UTE Events: Presidents' Conference, Regional, Inter-Regional, Convention Committee Meetings, 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 Caucuses shall accommodate members with dietary requirements, medication, mobility assistance, etc. (i.e. diabetics, brain tumor- require medicationwith 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 **/** Adopted December 2001 **/** Amended September 2002 **/** Amended March 2007 **/** Amended June 2008 **/** Amended December 2013 **/** Amended March 2014 **/** Amended December 2016 **/** Amended March 2026

REGULATION NO. 21 - FAMILY CARE EXPENSES

21.1 FAMILY CARE / PET CARE EXPENSES

1. UTE members shall be entitled to be reimbursed for family care / pet care expenses in respect of children eighteen (18) years of age or younger and for adults who are in need of special care or family pets who either permanently reside in the household of the member orwith whom the member permanently resides.

2. Family care / pet care expenses shall be reimbursed to members who are required to attendunion business authorized by UTE.

3. Family care / pet care expenses which are part of a member's normal family care arrangements shall not be paid.

21.2 UTE GUIDELINES

21.2.1 Normal Family Care / Pet care Arrangements

(1) Normal family care / pet care arrangements are defined as those arrangements that would cause family care / pet care expenses to be incurred if you were at work performing duties for the employer during scheduled hours of work. It also includes

any arrangementduring hours not at work but expenses would be incurred whether you were performing union duties or not.

(2) Family care / pet 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 / pet 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.

21.3 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 / pet care expenses if they were at work, unless the member is not also being reimbursed for salary expensesfor the same authorized UTE activity by UTE.Reimbursement of Fees

1. Where the care is provided by someone other than a licensed agency/caregiver or the spouse/partner, former spouse/ partner with custody rights. In the case of care for family pet reimbursement, those family members residing in the same household as the pet are not entitled to reimbursement.

    a) the actual amount up to a maximum of $80 per day (for each 24-hour period) for the first family member;
    b) the actual amount up to a maximum of $55 per day (for each 24-hour period) for each additional family member.
    c) the actual amount up to $50 per day (for each 24-hour period) for pet care.

2. If care is provided by a licensed agency/attendant, the actual fees will be reimbursed for the family care only. For pet care, actual fees will be caped at $50 per day (for each 24-hour period)

3. Pre-Approved Exceptions shall be submitted to the 1st Vice-President, or in their absence the President, **a minimum of 14 days prior to the event**. Consideration will be given to special needs or unusual circumstances resulting in costs which exceed the above rates and expenses allowable.

4. A completed Family Care / Pet care Expense Claim form must be submitted, accompaniedby a receipt, which must include the following information:
    a) Caregiver's full name
    b) Caregiver's full address
    c) Caregiver's telephone number
    d) Caregiver's license number (if applicable)
    e) Detailed dates and hours when the care was provided for each individual family member / or pet
    f) Amount charged
    g) Caregiver's signature

Adopted September 1985 **/** Amended July 1990 **/** Amended December 1996 **/** Amended March 1997 **/** Amended December 2001 **/** Amended December 2007 **/** Amended June 2008 **/** Amended September 2019 **/** Amended September 2023 **/** Amended March 2024 **/** Amended September 2024

REGULATION NO. 22 - TERMS AND CONDITIONS FOR THE POSITION OF THE ELECTED PAID OFFICERS

22.1 TENURE OF OFFICE

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

22.2 PAY

(1) The Officers shall be remunerated as provided:

a. The President:
$**146,349.00**

b. The 1st Vice-President:
$**124,349.00**

c. The 2nd Vice-President
$**109,278.00**

(2) The Officers shall receive salary increases in accordance with the PSAC/CRA negotiated salary percentages increase set for the SP-05 group and level.

(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.

(4) When the 1st Vice-president is required to replace the President for a period of at least three (3) consecutive working days, the 1st Vice-president shall be paid acting pay.

(5) When the 2nd Vice-president is required to replace the President for a period of at least three (3) consecutive days, the 2nd Vice-president shall be paid acting pay.

22.3 DESIGNATED PAID HOLIDAYS

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

22.4 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.

(a) the President shall notify the 1st Vice-President when utilizing such credits; and

(b) the 1st Vice-President shall notify the President when utilizing such credits.

(c) The 2nd 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 either Officer 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 an Officer ceases to be employed by the UTE and returns to employment with the CRA, the Officer shall be deemed to have available to them the balance of the sick leave credits accumulated at the time of their departure from the UTE. The credits will be available to be utilized if the Officer is required to take sick leave without pay from the CRA due to a lack of CRA sick leave credits. The Officer must satisfy the UTE, in a manner deemed appropriate by the UTE (i.e. such as atime report), that they have taken sick leave without pay from the CRA.

(7) The Officers shall report the balance of their sick leave credits available at each Executive Council meeting verbally.

22.5 VACATION LEAVE WITH PAY

(1) a. 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 of the current AEU collective agreement.

b. Employment with CRA shall be used in the calculation of continuous employment for purposes of Section a.

(2) In order to utilize this leave provision:

(a) the President shall notify the 1st Vice-President; and

(b) the 1st Vice-President shall notify the President.

(c) The 2nd Vice-President shall notify the President

(3) An Officer may carry over any vacation leave credits but not in excess of one (1) 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.

22.6 OTHER TYPES OF LEAVE

(1) An Officer shall be entitled to other types of leave with or without pay on the same basis to those leave provisions in the UTE/AEU collective agreement.

(2) In order to utilize the leave provisions:

(a) the President shall notify the 1st Vice President; and

(b) the 1st Vice-President shall notify the President.

(c) The 2nd Vice-President shall notify the President.

22.7 TRAVEL EXPENSES

The Officers are entitled to be reimbursed travel expenses as they apply to the other Officers of the Executive Council.

22.8 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.

22.9 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 December 1995 / Amended December 1996 / Amended March 2001 / Amended June 2002 / Amended July 2002 / Amended June 2005 / Amended December 2007 / Amended July 2008 / Amended March 2010 / Amended September 2010 / Amended December 2013 / Amended March 2017 / Amended June 2017 / Amended September 2019 / Amended December 2019 / Amended August 2023 / Amended December 2023 / Amended December 2024

REGULATION NO. 23 - MARGUERITE STONEHOUSE MEMORIAL SCHOLARSHIPS (Labour College of Canada Scholarship)

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 two (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 (LCC) after her.

(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 Labour College of Canada Certificate Program can apply for the scholarship~~s~~.

(3) The Executive Committee of UTE shall award the scholarships by taking into account the recommendations made by the Labour College of Canada Selection Committee.

(4) Each year, UTE will award one (1) scholarship for ~~a~~ member selected for the LCC Certificate Program.

(5) Any member approved for the scholarship will have their expenses to participate in the LCC Certificate Program reimbursed as per UTE Regulations, subject to the approval of the 1st Vice-President.

Adopted June 1985 **/** Amended July 1987 **/** Amended September 1989 **/** Amended December 1996 **/** Amended September 1998 **/** Amended December 1999 **/** Amended September 2012 **/** Amended December 2013 **/** Amended July 2014 / French only June 2015 / Amended September 2019 **/**

REGULATION NO. 24 - HONOURS AND AWARDS

24.1 ADMINISTRATION

(1) Nominations listed in this Regulation must be submitted by a member other than the nominee, except for Scholarships and ICA.

(2) All submissions except for Service Pins should be submitted to the Chairperson of the Honours and Awards Committee.

(3) The Committee shall have at least thirty days (30) to review all submissions prior to making a recommendation to Executive Council.

(4) The Honours and Awards Committee shall present any nomination, with its recommendation, at the following meeting of the Executive Council with the exception of nominations made under 24.2 Certificate of achievement (Al Lough Award). A recommendation for this award shall be submitted to the National President for approval upon adoption by the Honours and Awards Committee.

(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 demonstrated their commitment to achieving the aims and objectives of UTE.

24.2.1 Presentation

The award shall be presented at a Local or Regional event, or National President's Conference by a Union Official.

24.3 SERVICE PINS

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 Executive Council Officers' recommendation.

24.3.1 Presentation

The service pins shall be presented at a Local, Regional or National Union Event by a union official. Time permitting, twenty (20), twenty-five (25), thirty (30), and thirty-five (35) year pins may be awarded at a Presidents conference, if the recipient is in attendance at such event.

24.4 CERTIFICATES AND AWARDS FOR LONG SERVICE OF 40 YEARS OR MORE

(1) A certificate and an award shall be issued to individuals who have served the membership in the union for a period of 40 years or more. Such certificate and award shall be issued at the recommendation of a Local or an Executive Council member.

(2) The certificate for long service of 40 years or more is a document bearing an appropriate dedication.

(3) The award should be one of the following: a pin, a ring or a watch. All awards issued must bear the UTE logo.

24.4.1 Presentation

The award shall be presented at a Local or Regional Event, National President's Conference, or National Convention by a Union Official.

24.5 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;

(i) Definition of Exemplary Service:

1. serving as an example; by demonstrating union values;
2. admirable, commendable, ideal model, praiseworthy or exceptional.

(c) accumulated service at any level of UTE for a minimum of five (5) years.

24.5.1 Presentation

The award shall be presented at a Local or Regional Event, or National President's Conference by a Union Official.

24.6 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) Members shall be invited to our Convention, and for those that wish to attend, all of their expenses shall be paid in accordance with these By-Laws and Regulations as if they were a delegate.

(5) Members will be recognized at Convention.

(6) 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; and

(c) exhibited exemplary service at the Local and national level of UTE.

i) Definition of Exemplary Service:

(1) serving as an example, by demonstrating union values.
(2) admirable, commendable, ideal model, praiseworthy, exceptional, or outstanding.
(3) demonstrating leadership in advancing the union movement for the betterment of all members.

(7) To receive a Life Membership Award, a 2/3rd majority vote is required at Executive Council.

24.6.1 Presentation

(1) The award shall be presented at a National President's Conference, or National Convention by a Union Official.

(2) If the recipient is not attending the event, UTE will cover the necessary expenses if the recipient wishes to attend to receive their award.

24.7 THE UNION OF TAXATION EMPLOYEES HUMANITARIAN AWARD

(1) This award is limited to one candidate only per year within the applications

received.

(2) All nominations for this award must be received by the Chairperson of the Honours and Awards Committee by December 15th at 23:59 (EST) of each year.

(3) The award shall be a suitably inscribed plaque and will include an award of two thousand five hundred dollars ($2,500.00).

(4) The award and the recipient will be recommended by the Honours and Awards Committee to the Executive Council.

(5) The monetary award will be paid to the cause espoused by the recipient or to a charity of their choice.

(6) Nominees must:

(a) be a member of UTE in good standing;

(b) have demonstrated their commitment to a humanitarian cause where there is extreme need;

(c) have exhibited exemplary service to others within their community, their country or throughout the world.

(i) Definition of Exemplary Service:

1. serving as an example by demonstrating union values.
2. admirable, commendable, ideal model, praiseworthy or exceptional.

24.7.1 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.

24.7.2 Presentation

The award shall be presented at a Local or Regional Event, or National President's Conference by a Union Official.

24.8 UTE COMMUNITY SERVICE AWARD

(1) The award shall be a suitably inscribed framed certificate.

(2) Nominees must:

(a) be members in good standing of UTE;
(b) have 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; and
(f) detailed information indicating the time devoted and the level of achievement.

24.8.1 Presentation

The award shall be presented at a Local or Regional Event, or National President's Conference by a Union Official.

24.9 UTE SCHOLARSHIP

The Union of Taxation Employees - PSAC
Scholarship Guidelines

The Union of Taxation Employees (UTE) each year offers two (2) three thousand dollars ($3,000.00) National Scholarships~~,~~

- Diana Gee National Scholarship
- Robert "Bob" Campbell National Scholarship

There are also ten (10) one thousand five hundred dollars ($1,500.00) Regional Scholarships:

- Al Rollins Atlantic Regional Scholarship
- Québec Regional Scholarship
- Jean Bergeron Montréal Regional Scholarship
- Shane O'Brien National Capital Regional Scholarship
- Linda Collins Greater Toronto Regional Scholarship
- Nick Stein Southwestern Ontario Regional Scholarship
- Kent McDonald Northern and Eastern Ontario Regional Scholarship
- Gary Esslinger Prairies Regional Scholarship

- Don Davoren Rocky Mountains Regional Scholarship
- Pacific Regional Scholarship

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

The Union of Taxation Employees (UTE) each year also provides ten (10) regional scholarships in the amount of one thousand dollars ($1,000.00) sponsored by ThePersonal Insurance Company (ThePersonal). These will be chosen following the same criteria as the UTE scholarships.

Eligibility:

All scholarships are available for members in good standing of the UTE (or who at the time of their departure from CRA in the same calendar year were members in good standing of the UTE), including 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 UTE 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;

Requirements:

- Proof of registration including applicant's name, the name of the University,College or Institute of higher learning you will be attending must be submitted. Attendance shall be verified before the granting of the award;

- A minimum of five hundred (500) words to a maximum of seven hundred (700) words essay or submission in an audio format, visual (painting, drawing, sculpture or photograph), or video format that would express your view. If the submission is

audio or video it must be 3-5 minutes in duration. If the submission is by audio or visual, you must provide an explanation of how it meets one of the topics.

- Failure to stay within the minimum and maximum word/time requirements will result in disqualification.

- There shall be up to 4 topics to choose from, as selected by the UTE Honours and Awards Committee, that will be published each March.

All submissions become the property of the UTE.

Criteria:

The UTE Honours and Awards Committee will base their selection on the following:

- Submission by the applicant (details outlined under requirements);

- Statement outlining the nature and length of your most recent community involvement;and

- Statement of applicant's union involvement.

Preference may be given to applicants 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. However, if the member is not a member in good standing as of June 15, the application will be excluded**.**

The UTE 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 UTE Honours and Awards Committee may award a Regional Scholarship outside of a particular regionif 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 the application, otherwise it will be considered incomplete. The application must be postmarked by no later than June 15th at 23:59 (EST).

Application forms are available at: www.ute-sei.org (the UTE website).

Application forms may be completed on-line at www.ute-sei.org or sent by mail to:

The Union of Taxation Employees
Attn: UTE Honours and Awards Committee
275 Bank Street Suite 400
Ottawa ON K2P 2L6

24.10 AWARD OF MERIT IN THE FIELD OF HEALTH AND SAFETY - ELIZABETH (BETTY) BANNON

(1) This award is limited to one candidate only per year within the applications received.

(2) The award shall be a suitably inscribed plaque.

(3) All nominations for the award shall be submitted to the Chairperson of theHonours and Awards Committee.

(4) After consultation and collaboration with the UTE National Health and Safety Committee, the recipient will be recommended by the Honours and Awards Committee to the Executive Council.

(5) All nominations for this award must be received by the Chair of the Honours and Awards Committee by December 15th at 23:59 (EST) of each year.

(6) Nominees must:

(a) be a member of UTE in good standing;

(b) have demonstrated their commitment to protecting CRA employees' health and safety;

(c) have accumulated service as a UTE member on a Workplace or National Health and Safety Committee for a minimum of five (5) years; and

(d) have exhibited exemplary service in the field of health and safety.

i. Definition of Exemplary Service:

1. Serving as an example in the field of health and safety.
2. Extraordinary, praiseworthy, exceptional or outstanding.

ii. Examples of Exemplary Service:

1. Identifying/resolving major infractions of the Canada Labour Code.
2. Instituting proactive health and safety measures at a local or national level.
3. Organizing health and safety events.
4. Implementation of awareness initiatives.
5. Delivering Health & Safety training.

24.10.1 Submission

The application shall contain the following:

1. Name of the nominee;
2. Name of the nominator;
3. Introduction of the nominee; and
4. Detailed information pertaining to the member's involvement on their Health and Safety Committee; including their significant efforts, achievements and accomplishments.

24.10.2 Presentation

The award shall be presented at a Local or Regional Event, National President's Conference, or National Health and Safety Conference by a Union Official.

24.11 ICA SPONSORSHIP AND SUBSIDY

Each year the Union of Taxation Employees sponsors a student and subsidizes a member in good standing to travel with the International Children's Awareness (ICA). ICAfocuses on holistic development in Cameroon including projects such as bringing fresh water to villages, building schools and health clinics. The trip is usually in February.

24.11.1 Student Sponsorship

(1) The sponsorship will be awarded to a student 18 years of age or older who is enrolled in post-secondary education.

(2) The sponsorship will cover all costs associated with their travel to the country chosen by ICA. These costs shall include; the cost of travel, obtaining Visas, vaccinations, accommodations and per diems en route and any other related costs.

24.11.2 Member Subsidy

(1) The subsidy will be awarded to a member of UTE in good standing who is 18 years of age or older.

(2) The subsidy will cover all costs associated with their travel to the country chosen by ICA. to a maximum of three thousand five hundred dollars ($ 3 500.00). These costs shall include; the cost of travel, obtaining Visas, vaccinations, accommodations and per diems en route and any other related costs. The subsidy doesn't cover the reimbursement of any loss of salary.

(3) Under exceptional circumstances, the President shall have the authority, in consultation with the 1st Vice-President, to increase the amount of the subsidy.

24.11.3 Guidelines and Requirements

(1) The applicants must:

(a) have an up to date passport;

(b) have received all of the required inoculations prior to leaving for the country chosen by ICA.;

(c) sign a waiver with the Union of Taxation Employees, exempting the Union of any liability for accidents or injuries that may occur;

(d) complete any paperwork that is required by ICA;

(e) submit an application including their name and contact information and be sent to the Honours and Awards Committee by September 15th, at 23:59 (EST). A 400 to 700 words essay or an audio or video submission no longer than 4 minutes, on explaining why you would like to be a part of the ICA team to the country chosen by ICA and the International Children's Awareness projects.

(f) in the event that more than one application is received, the Honours and Awards Committee shall choose the successful applicant after reviewing and ranking all submissions;

(g) if the top ranked individual is unable to attend, the next ranked applicant who is available and accepts the invitation shall be chosen.

(2) Preference shall be given to members or students who have never been on this trip.

24.11.4 Annual Donations and Donation Reminder

(1) If in a given year, no student is selected to go with ICA, additional applicant(s) may be considered the following year(s). No more than 3 students will be selected during any 3-year budget cycle.

(2) If in a given year, no member is selected to go with ICA, additional applicant(s) may be considered the following year(s). No more than 3 members will beselected during any 3-year budget cycle.

(3) UTE will annually remind its membership to consider a donation to ICA as part of the annual Government of Canada Workplace Charitable Campaign (GCWCC).

(4) UTE will make an annual donation to ICA in the amount equal to the rebate UTE receives from ThePersonal. Such contribution shall not exceed an amount of $5,000.

Adopted September1986 **/** Amended March 1987 **/** Amended June 1988 **/** Amended September 1988 **/** Amended March 1989 **/** Amended December 1992 **/** Amended December 1996 / Amended December 2000 **/** Amended June 2002 **/** Amended December 2003 **/** Amended July 2005 **/** Amended March 2006 **/** Amended September 2006 **/** Amended December 2006 **/** Amended September 2007 **/** Amended December 2007 **/** Amended June 2008 **/** Amended September 2008 **/** Amended December 2008 **/** Amended March 2009 **/** Amended September 2009 **/** Amended September 2010 **/** Amended December 2010 **/** Amended March 2011 **/** Amended July 2011 **/** Amended December 2011 **/** Amended March 2012 **/** Amended September 2012 **/** Amended December 2013 **/** Amended June 2015 **/** Amended September 2015 **/** Amended December 2016 **/** Amended September 2018 **/** Amended December 2018 **/** Amended September 2019 **/** Amended December 2020 **/** Amended July 2021 / Amended July 2022 **/** Amended March 2023 **/** Amended June 2023 **/** Amended September 2023 **/** Amended March 2024 **/** Amended June 2024 / Amended September 2024 / Amended June 2025 / Amended September 2025 / Amended December 2025

REGULATION NO. 25 - TRUSTEESHIP

25.1 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 13, 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 - DISCIPLINE PROCEDURES

26.1 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 allegation(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 allegation of misconduct is made 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 are 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 ALLEGATIONS AND THE ESTABLISHMENT OF AN INVESTIGATIONS COMMITTEE

(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; and

(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) (a) 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.);

(b) Notwithstanding 2 (a) and (b) above, the President shall have the authority to intervene and establish an Investigative Committee at the national level; and

(c) All persons appointed to an Investigative Committee must have completed the PSAC Internal Investigations Training Course.

(4) The Committee shall provide the member against whom the allegation has been made with a copy of the written allegation(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.

26.3 GUIDELINES FOR INVESTIGATION

26.3.1 Investigation Committee

The role and responsibilities of the Committee include:

(1) All persons appointed to the Committee must have completed the PSAC Internal Investigations Training Course.

(2) Providing the member accused with a copy of the written allegation(s).

(3) Ensuring the investigation is impartial and is seen as such by all parties.

(4) Investigating the allegations with appropriate discretion and ensuring that the investigation is done in a timely fashion.

(5) Interviewing witnesses and reviewing all relevant documents identified by the parties.

(6) Submitting a written report to the body which established the Committee, the member making the allegation and the member accused.

(7) Keep all information obtained as a member of the committee confidential.

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 allegation 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; and

(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 I 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 II of the report shall indicate whether corrective action is recommended including any specific disciplinary action such as suspension from membership and/or removal from office. 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; and

(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.

(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 Local meeting or Executive Council. Any amendments must be agreed to by the Committee; such amendments shall be for clarification or process purposes only.

(3) 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.

(4) 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.

(5) If disciplinary action is recommended at the Local level, the Local Executive shall present 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. Should the Committee report recommendations not receive two-thirds (2/3)

acceptance, rationale for the rejection must be provided to the persons involved.

(a) 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 within sixty (60) calendar days of receipt of the disciplinary notification;

(b) If the Local meeting accepts a recommendation to suspend or expel from membership the Local will convey the recommendation to the President, who shall submit such recommendation to the PSAC National Board of Directors together with all relevant documentation.

(6) 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 to the persons involved.

(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 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.

26.4 APPEAL PROCESS

The appeal process is an informal process that is accessible to all members and shall allow the parties involved to be heard.

26.4.1 For discipline recommended by a Local

(1) The written request for an appeal of a Local disciplinary recommendation must be received by the Local Executive within sixty (60) days of receipt of the disciplinary recommendation.

(2) The Local Executive will appoint an Appeals Officer to hear the appeal within sixty (60) days of receipt of the appeal. The Appeals Officer must be agreed upon by all parties.

(3) The appeal hearing will be held within sixty (60) days of the appointment of the Appeals Officer.

(4) The Local Executive will ensure that a copy of the Local Investigative Committee report be given to the Appeals Officer prior to the appeal hearing.

(5) The appellant has the right to be heard and to be represented at the appeal hearing.

(6) The Local Executive has the right to be heard and represented at the appeal hearing.

(7) The Appeals Officer will schedule the hearing date and communicate the date of the hearing to the Appellant and the Local Executive representative.

(8) The appellant or their representative shall make a presentation to the Appeals Officer outlining why they do not believe the removal from office or other disciplinary recommendation was justified.

(9) Any witnesses for the appellant shall make a presentation to the Appeals Officer outlining any role they were involved with which impacted upon the removal from office or other disciplinary recommendation.

(10) The representative from the Local Executive shall make a presentation to the Appeals Officer outlining why the action to remove from office or other disciplinary recommendation was taken.

(11) Any witnesses for the Local Executive shall make a presentation to the Appeals Officer outlining any role they were involved with which impacted upon the removal from office or other disciplinary recommendation.

(12) The Appeals Officer may ask questions of clarification, which arise from the presentations.

(13) Both the appellant or their representative and representative from the Local Executive shall be provided with an opportunity to make a closing statement.

(14) The Appeals Officer shall render a written decision no later than thirty (30) days from the date they received the closing statements and shall forward the decision to the parties involved.

(15) The appeal decision of the Appeals Officer shall be final and binding on all parties to the appeal.

(16) The Local President shall have the authority to remove a member from office in order to reinstate a member to office, in compliance with an appeal decision.

26.4.2 Appeal Hearing Costs for discipline recommended by a Local

(1) The Local will be responsible for all costs associated with the Appeals Officer.

(2) Each party shall be responsible for their own expenses.

(3) The expenses of the representative of the appellant shall be borne by the appellant.

(4) Each party shall be responsible for any expenses incurred as a result of testimony from any witness they wish to call.

(5) If the appellant's appeal is successful, the appellant may be entitled to reasonable expenses as determined by the Local Executive.

26.4.3 For discipline recommended by the Executive Council

(1) The written request for an appeal of a disciplinary recommendation must be received by the President within sixty (60) days of receipt of the disciplinary recommendation.

(2) The President will appoint an Appeals Officer to hear the appeal within sixty (60) days of receipt of the appeal. The Appeals Officer must be agreed upon by all parties.

(3) The appeal hearing will be held within sixty (60) days of the appointment of the Appeals Officer.

(4) The President will ensure that a copy of the Investigative Committee report be given to the Appeals Officer prior to the appeal hearing.

(5) The appellant has the right to be heard and to be represented at the appeal hearing.

(6) The Executive Council has the right to be heard and represented at the appeal hearing.

(7) The Appeals Officer will schedule the hearing date and communicate the date of the hearing to the Appellant and the Executive Council representative.

(8) The appellant or their representative shall make a presentation to the Appeals Officer outlining why they do not believe the removal from office or other disciplinary recommendation was justified.

(9) Any witnesses for the appellant shall make a presentation to the Appeals Officer outlining any role they were involved with which impacted upon the removal from office or other disciplinary recommendation.

(10) The representative from the Executive Council shall make a presentation to the Appeals Officer outlining why the action to remove from office or other disciplinary recommendation was taken.

(11) Any witnesses for the Executive Council shall make a presentation to the Appeals Officer outlining any role they were involved with which impacted upon the removal from office or other disciplinary recommendation.

(12) The Appeals Officer may ask questions of clarification, which arise from the presentations.

(13) Both the appellant or their representative and representative from the Executive Council shall be provided with an opportunity to make a closing statement.

(14) The Appeals Officer shall render a written decision no later than thirty (30) days from the date they received the closing statements and shall forward the decision to the parties involved.

(15) The appeal decision of the Appeals Officer shall be final and binding on all parties to the appeal.

(16) The President shall have the authority to remove a member from office in order to reinstate a member to office, in compliance with an appeal decision.

26.4.4 Appeal Hearing Costs for discipline recommended by the Executive Council.

(1) UTE will be responsible for all costs associated with the Appeals Officer.

(2) UTE will be responsible for all cost associated with the meeting space in which the appeal hearing is held.

(3) Each party shall be responsible for their own expenses.

(4) The expenses of the representative of the appellant shall be borne by the appellant.

(5) Each party shall be responsible for any expenses incurred as a result of testimony from any witness they wish to call.

(6) If the appellant's appeal is successful, the appellant may be entitled to reasonable expenses as determined by the Executive Council.

Adopted September 1978 **/** Amended December 1992 **/** Amended March 1993 **/** Amended December 1996 **/** Amended June 2000 **/** Amended March 2002 / Amended July 2005 **/** Amended June 2006 **/** Amended June 2012 **/** Amended September 2015 **/**

REGULATION NO. 27 - ESSENTIAL SERVICES EMPLOYEES

27.1 ESSENTIAL SERVICES EMPLOYEES

(1) Essential services 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) Essential services 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) Essential services employees who show proof of paying twenty-five percent (25%) of salary either to the PSAC National or Regional Hardship funds shall be exempt from Regulation.

27.2 EXCLUDED POSITIONS

Members who occupy Managerial or Confidential excluded positions on a temporary basis shall relinquish all union positions until such time the members return to a UTE bargaining unit position.

Adopted March 1993 **/** Amended December 1996 **/** Amended December 2001 **/** Amended July 2002 **/** Amended September 2007 **/** Amended June 2011 **/** Amended July 2011 **/**

REGULATION NO. 28 - PROTOCOL ON MOURNING

28.1 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 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 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 Officer: 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 arrangements 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 /

REGULATION NO. 29 - DONATIONS/SPONSORSHIP GUIDELINES

(1) Under the line item Donations/Sponsorships:

(a) Donations are defined, as monies given which must be helpful to a Community, Organization, Union or Individual;

(b) Sponsorships are defined as monies given to activities; teams or individuals where there are promotional aspects for the Union of Taxation Employees.

(2) Requests for funds will be submitted by the member to their Local, who willthen transmit them to their RVP. The RVP will forward the request to the National President with a recommendation.

(3) The National President may approve donations/sponsorships up to five hundred dollars ($500.00) with the agreement of the 1st Vice President. In the absence of the National president or 1st Vice President, the 2nd National Vice President shall be delegated as one of the two approval officers

(4) All Donations/Sponsorship funds will be approved and expended in the Calendar year.

(5) The maximum sponsorship per request shall be five hundred dollars ($500.00) per

(6) year except under exceptional circumstances this may be increased by a two- thirds (2/3) vote of Council.

(7) Every January a complete list of donations/sponsorships will be sent to all Locals. (whom, city and the amount).

(8) All donations/sponsorships cheques will be made out to the organization, team, and individual etc. for whom the amount was approved.

(9) A minimum of two thousand dollars ($2,000.00) of the line item Donations/Sponsorships be allocated to Strike Appeals and Holiday Relief Funds; and

(10) If less than the $2,000.00 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.

Sections 8 and 9 were adopted in October 2004 and transferred from the Resolution of Record in December 2013.

Adopted June 2003 / Amended September 2009 / Amended December 2013 / Amended June 2022 /

REGULATION NO. 30 - MEMBERSHIP APPRECIATION FUND

30.1 POLICY

UTE will provide a subsidy to Locals who hold a Membership Appreciation Event.

30.2 DEFINITION

(1) A Membership Appreciation Event is a social gathering that would allow for the interaction of Local Executives and their membership. Examples of this type of event: BBQ, Wine and Cheese, Christmas Party, Dance, etc.....

(2) Local Annual General Membership meetings, Local General Membership

meetings, and any PSAC event will not be subsidised from this fund.

30.3 GUIDELINES

(1) Locals may request funding to a maximum of **one thousand five hundred** dollars **($1,500.00)** per year.

(2) To access the subsidy, locals must match dollar for dollar from their own local funds.

(3) To request funding, Locals must prepare a proposal that shall include the following:

(a) type of event;
(b) date of event;
(c) location of the event;
(d) estimate of number of members attending;
(e) budget for the event;
(f) amount of subsidy requested.

(4) The Local shall forward their proposal to their RVP, who will forward it on to the President.

(5) All proposals must be approved by the President and the 1st National Vice-President before the event occurs.

(6) Within thirty days of the event, the Local(s) shall provide a report to the President on how well the event went and an accounting of all monies spent, including copies of receipts. The subsidy will then be sent to the Local.

Adopted March 2012 **/** Amended December 2012 **/** Amended July 2021 **/** Amended December 2023 **/**

REGULATION NO. 31 - GUIDELINES FOR FUNDING POLITICAL ACTION/CAMPAIGNS

The Guidelines apply to requests to conduct Political Action or Campaigns submitted by a UTE Local, a Region, Executive Council or the National Office.

GUIDELINES:

(1) A Local, a Region, Executive Council or the National Office may request funding to conduct a Political Action or Campaign.

(2) To request funding, a “proposal for funding” shall be submitted. The proposal should include:

(a) type of event/campaign;
(b) objective of the event/ campaign, including targeted audiences;
(c) date/timeline of the event/campaign;
(d) location of the event/campaign;
(e) estimate of number of members attending, if applicable;
(f) budget for the event/campaign should include, but not limited to, costs for travel, translation, loss of salary, per diems, rentals, materials, etc.
(g) amount requested;
(h) an outline of how the event or campaign is UTE specific;
(i) the name and the contact information of 1 (one) direct contact person.

(3) All proposals must get prior approval by both the President and the 1st Vice-President before the event occurs. In the absence of either the President or 1st Vice-President, the 2nd Vice-President shall replace the absent officer.

(4) A Local request shall be forwarded to their RVP, who will forward it to the delegated authority outlined in 31.3 above. All other requests shall be forwarded directly to the delegated authority outlined in 31.3 above.

(5) An advance may be requested prior to the event taking place. Such requests are subject to approval by both the President and the 1st Vice-President. In the absence of either the President or 1st Vice-President, the 2nd Vice-President shall replace the absent officer.

(6) Within thirty days of the event/ campaign, the requester shall provide a report to the President on how well the event/campaign went and an accounting of all monies spent, including receipts for reimbursement.

Adopted June 2016 / Amended March 2025

LIFE MEMBERS AND HONORARY MEMBERS

LIFE MEMBERS

Pamela Abbott
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
Cosimo Crupi
Jerry Dee
Arthur Dickinson
Terry Dupuis
Donald Ells
Gerard Ennis
Gary Esslinger
Debbie Ferguson
Cathy Figueira
Dave Flinn
Cecil Foley
Gil Folkedahl
Jean-Pierre Fraser
Doug Gaetz
Madonna Gardiner
Gwen Jackson
Sabri Khayat
Denis Lalancette
Frank Lancaster
E.C.H. Leslie
Al Lough
Kent MacDonald
Lorne Menzies
Harold Neun
Brian Oldford
Peter Otterdahl
Fred Perrott
David Quist
Clare Scott
Nick Stein

HONORARY MEMBERS

Carmen Armstrong 🕊

Ghyslaine Audet

Hélène Gagner

James Infantino

Donna Nitz

Shane O'Brien

Bob Wallace 🕊

Adopted June 1998 /
Amended September 2018
Amended December 2018
Amended August 2023
Amended July 2025

APPENDIX " A "- 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 rational 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. 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

4. 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

5. FEMALE REPRESENTATION

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

Adopted September 1990

6. PRESERVATION OF ENVIRONMENT

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

Adopted September 1990

7. TRANSLATION OF DOCUMENTS

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

Adopted September 1992

8. 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

9. 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

10. 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

11. 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

12. 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

13. 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

14. 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

15. CRA - EMPLOYMENT EQUITY

BE IT RESOLVED the Employer be held accountable to provide Local Equity Committees a complete and detailed copy of its 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

CRA - EMPLOYMENT EQUITY

BE IT RESOLVED THAT all levels of the Union acquire from the Employer their employment equity action plans at least three months (3) 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 theEmployer institute its employment equity staffing objectives on a timely basis consistent with the employment equity action plan.

Adopted July 2002

16. 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

17. 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

18. PROTOCOL

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

Adopted July 2005

19. 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

20. 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

21. 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

22. 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

23. UTE EVENT – UNION LWOP

BE IT RESOLVED THAT UTE pursue negotiations with the Employer to ensure that members continue to receive their pay cheque without "union leave without pay" deductions and the Employer directly invoices UTE for such "union leave without pay".

Adopted July 2008

24. NATIONAL POLICY ON LANGUAGE

BE IT RESOLVED THAT UTE develop and adopt a National Policy that UTE does not endorse creation of this National Third Language Directory and that the employer cease making the request for employees.

Adopted September 2006

25. AIR CARRIER

BE IT RESOLVED THAT the current UTE policy on flying unionized air carrier be amended to include where a community is not serviced by a unionized air carrier that members flying on union business be allowed to request that the non-unionized carrier be used.

The determination to allow will rest with the National President.

Adopted June 2012

Appendix "B"CONVENTION FINANCE COMMITTEE RECOMMENDATIONS OF RECORD

1. Finance Recommendation # 5 from the 2005 Convention

BE IT RESOLVED THAT UTE discontinue the practice of calculating all retroactive cheques for members for union leave without pay, unless requested by the member.

2. Finance Recommendation # 7 from the 2008 Convention

BE IT RESOLVED THAT for all conferences, excluding Presidents' Conference, the organizing Committee shall submit, in writing to the National President, a request for funding. The request shall include:

a) the date
b) location
c) proposed agenda
d) proposed budget
e) names of guests that require the spending of UTE funds.