



WHERE'S THE FUNDING?
cupe.on.ca/wtf

Where's The Funding?

(A Practical Guide)

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Introduction

This guide has been developed from the OUWCC report, “*Unpacking Public Funding for Post-Secondary Institutions in Ontario.*” It summarizes our findings and creates an easy-to-use guide to help Locals investigate privatization on campuses, track public funding dollars and will be a tool for bargaining.

This guide is meant to provide you with ideas for how we would like you to implement this campaign on your campus. You have been provided a number of recourses in your WTF kit that are explained throughout the sections of this guide. While all the resources provided were created with a specific purpose in mind, we hope that you will come up with creative ways to engage with this campaign, in ways that make sense for your specific campus. We hope that this campaign will be a fun way to start conversations about privatization and underfunding with your members, students, and other workers on campus

Purpose

Universities are not required to meet the same level of public funding accountability standards as other publically funded institutions such as colleges, hospitals, and school boards.

For example, colleges must submit detailed accounting reports of why they need the money, where it will go, what goals it will be used to achieve, as well as accounting for how they spent the previous year’s money, in order to secure further funding.

Universities simply count heads and the provincial government hands over the money.

Shouldn’t students and families know where that funding goes to? Shouldn’t universities be subject to the same transparency and accountability as colleges, hospitals and other public institutions?

Each university is governed by separate legislation, called the Acts to Incorporate. This makes it difficult for government to find funding and accountability solutions. Rather than addressing the real problem, the Ontario Liberals are trying to decrease their investment in universities by *forcing 0% compensation* increases on workers and creating elaborate “restructuring” plans.

This guide is the beginning of a long-term plan to improve transparency, create accountability for the public funds universities receive, and to show the urgent need for greater accountability measures for public universities.

The resources provided in this guide are the first steps towards effecting meaningful change in our sector. Only through forcing our institutions to show us *Where The Funding* is going, will we be able to effectively lobby government to find solutions that meet the needs of workers on campus, students, and their families.

Should you need assistance or more information, do not hesitate to contact your OUWCC Campus Representative and/or your National Staff Representative.

A Short Note on Academic Freedom

It is not the intention of CUPE or the OUWCC to lobby for changes that may interfere with the academic policies of universities. As workers on university campuses we understand the importance of the government maintaining an arm's-length relationship from a university's research and education agendas in order to maintain the integrity of scholarly research and scientific exploration.

However, because of the structure of the legislation, it is necessary to lobby for change beginning with our provincial governments. Without legislative change, there are very few avenues for recourse when a university mis-manages public funds.

Furthermore, without governments willing to invest in public education, we will see the further infiltration of private interests, which also have the potential to compromise scientific rigor.

While we draw comparisons between colleges and hospitals, it is simply for illustrative purposes; to expose how differently Universities operate in comparison to other public institutions. It is not the intention of the OUWCC to suggest universities should be restricted in the same ways as colleges in terms of academic pursuits or degree-granting powers.

We believe that there is a way for governments to force universities to become more transparent and accountable to university stakeholders (students, academic workers, and support workers) without limiting academic freedom or interfering with the academic mission of a university. Such a solution calls for *true* innovation, not cost cutting measures, such as: putting more courses online, increasing class sizes, or downloading the financial burden onto students, their families, and workers.

It is our hope that through this research project and campaign, through gaining access to more pertinent information about the structure of university governance, and where the funding comes from and goes to, that we will be able to begin to create alternatives for Universities in Ontario.

Funding Structure

Access to public funding for Ontario universities begins with the federal government. The federal government distributes money to provincial governments, who in turn directly fund post-secondary institutions.

There is no federal mandate for how provinces distribute the federal monies they receive.

Most of the public funding for Ontario universities comes from the Ministry of Training, Colleges and Universities through the “funding formula”. While the formula itself is quite complicated, it is important to note public funding is based on enrollment rates at each institution.

Each domestic student is given a value (called a Basic Income Unit or BIU) based on their student status (full time vs part time), and educational program. Universities receive more money for students in “hard” sciences/info tech courses versus the “soft” social sciences or arts.

Ontario universities do not receive any public funding for international students, which is why international student tuition is unregulated by the government and international students pay such high tuition.

Different ministries and other government agencies also fund universities, much of which goes directly to research projects.

Although Ontario universities are required to publish an operating budget each year, it is more a summary of spending, and each institution can determine format and level of detail; typically resulting in scarce detail about certain revenue sources and how the money is spent.

There is no legal or legislated mechanism for repercussions to a university if the report is inadequate.

The only criteria the provincial government can use to reduce an institution’s level of funding are:

1. If an institution’s enrolment rate has dropped below 3% of the previous year’s enrolment
2. If an institution increases tuition above the government mandated tuition increase cap

Sources of Institutional Authority

There are 2 main sources of the authority granted to Ontario universities, the individual Act to Incorporate and the Board of Governor's (sometimes also called the Board of Trustees) By-laws.

Acts to Incorporate

- Each university has its own Act to Incorporate
- Each Act is a separate piece of provincial legislation
- Each Act sets out the legal responsibility of the institution, allocating authority to:
 - The Senate
 - Who make decisions about educational policy, the classes offered, schools and departments, and determine educational vision
 - The Board of Governors (hereafter referred to as "the Board")
 - Who make all operational and financial decisions
 - The Act gives the Board complete control of all monetary considerations, including those decisions made by the Senate that have financial implications

The Acts to Incorporate make no requirements of the Board to consult with the stakeholders of the institution such as students, faculty, or other employees before making any decisions.

The Acts to Incorporate empower the Board to determine their own by-laws.

By-Laws

The by-laws of the Board are created, amended, and ratified at the sole discretion of the Board.

The bylaws contain:

- The number of people and type of positions on the Board
- The elections process
- The committees of The Board
- A provision that absolves the Board of any fault or reprisals related to financial decisions made by the Board

The Board has no responsibility to consult with the stakeholders of an institution before making changes to or ratifying its bylaws.

Fast Facts 2010-2011¹

- The MTCU spent \$6.7 billion on post-secondary education; including universities, colleges, and training
- Ontario universities reported a total income of \$12.3 billion
- Universities in Ontario received \$4.3 billion in Ontario government grants and contracts, accounting for 35% of all university revenue
- Ontario universities received an additional \$1.6 billion in other government funding, including Federal, Municipal, Other Provinces, and Foreign Governments; accounting for 13% of university revenue
- Students paid \$3.1 billion in tuition to Ontario universities; accounting for 25% of university revenue
- Ontario universities received \$1.1 billion in private donations, corporate donations, non-government grants and contracts; accounting for 8.9% of all university revenue
 - Note: In 2008-2009 business and corporate entities donated \$495 million to Ontario universities; accounting for 4.7% of all university revenue²
- Presidents, Vice Presidents, and Deans³ on the sunshine list (those who make over \$100 thousand per year) made a total of \$134 million in wages, that is a full 1% of university revenue spent on just these faculty members⁴
 - The average salary was \$182 629 (excluding any benefits).
 - The highest salary was paid to the University of Toronto President: \$679 020.00
 - These salaries account for 3.1% of total Ontario University Expenses on wages and salaries

Note: The above percentages do not add to 100%. Universities also generate revenue/income from the sale of goods and services, miscellaneous fees, investment income, endowments, etc (please see the financial report for more information on university revenue sources).

¹ Unless otherwise noted, monetary amount are from the 2010-2011 budget year, and are aggregate amounts. Percentages will vary from institution to institution.

² This level of detail is not available for the 2010-2011 budget year

³ Full list of those included in this analysis are: Presidents, Principals, Vice Presidents, Associate Vice Presidents, Vice/Associate Principals, Registrars, Deans, Associate/Vice Deans, Provosts, and Vice/Associate Provosts

⁴ In 2010 this list was a total of 735 people

Member Mobilization

What?

Mobilization refers to the process of building a membership that is engaged with the activities of the union, knowledgeable about the goals of the union, actively involved in the union and its initiatives, and supportive of the union.

In a practical sense we are talking about a membership that comes out to membership meetings, runs for positions on the local executive board, is active on health and safety issues, comes to rallies, protests and other activities of the union, and supports the union.

Why?

An active membership base is crucial for making gains at the bargaining table, ensuring a safe workplace, running successful campaigns, fighting back against the Austerity agenda, and creating a sustainable local.

How?

There are a number of resources already available for CUPE Locals through CUPE Ontario and the OUWCC.

1. **Stand Up For Fairness.** It is already being run through CUPE Ontario and focuses on the important gains made for all workers through collective bargaining and how these gains are now being threatened by Conservative and Liberal legislation. Stand Up For Fairness is designed to help local executives plan one-on-one conversations with members about the importance of unions and to encourage members to sign pledge cards. While the work of Stand Up For Fairness is not focused exclusively on bargaining, it provides the basic tools and infrastructure Locals can use to also discuss issues like bargaining and funding challenges. We encourage all locals to make use of Stand Up For Fairness as a way to begin conversations with their members about the value of our union. You can get more information about Stand Up for Fairness online at: www.standupforfairness.ca, through your National Staff representative or area member facilitator.
2. **University Campaign/Education Workshops.** OUWCC has another campaign and education workshops specifically geared towards university workers. The first is our anti-privatization campaign. While we are still building this campaign, part of the campaign will be reaching out to coalition partners on your campus. This is also an excellent opportunity to talk to a variety of workers and students on campus to find out not only how under-funding is affecting them, but also how privatization is changing where we work and learn. We hope that this campaign and the anti-privatization campaign will fit together in a way that the contacts you make for one will be helpful for getting the word out about the other. The second tool the OUWCC has is the

“Understanding the Financial Climate at your University” workshop. Please see page 10 for more information.

3. **Other CUPE Educationals/Workshops.** Recommend that you look into the various education workshops provided by CUPE. These workshops will help the members of your local build the skills they need to be confident engaging in mobilizing work and talking to members and coalition partners on your campus. A list can be found online at: <http://ontarioeducation.cupe.ca/> or contact your National Representative for assistance. We recommend the “Building Strong Local Unions” and “Face-to-Face Communication” workshops to begin with.
4. **The Square and Post-Its.** Most importantly for this campaign, there are 2 mobilization tools built into this campaign that have been included in your kits; the Red Square and the Post-It Notes. We ask that all locals make use of these campaign materials as a starting point for this campaign, and as a way to engage your members with the central message of this campaign.

The Red Square, Poster and Post-its

The red square with the WTF logo is for distribution to your members and others on your campus. We encourage you to hand these out to individuals on your campus as a way to start a conversation about university under-funding. The red square is also a way to connect our campaign back to the student movement fighting back against tuition fees. While rising tuition is only one consequence of government underfunding, it may be a good starting point for making connections with students and student workers on campus. We also encourage you to speak with people more broadly about university underfunding. The fast facts at the beginning of this guide, and the financial report are other resources locals can use for talking about underfunding of post-secondary education in Ontario. If you would like some other speaking notes for engaging with members or others on your campus, please contact the OUWCC.

Should your local run out of buttons, or want more, they will be available for purchase, at cost, through OUWCC.

We have also included a poster template on your CD with the WTF logo. We encourage you to put the poster up on bulletin boards around your campus, and in your local office. We hope that the posters will help to advertise and create interest in the campaign. We encourage locals to adapt the poster with information about the way your local will be implementing the campaign such as: links to your local website, announcements about meetings related to the campaign, training sessions, and other activities.

WTF Post-It Notes

The post-it notes that have been included in the kits were the “brain-child” of one of our OUWCC members. Distribute these post-it notes to exec members, local members, students,

and other workers on campus who are interested in engaging in this campaign. The post-it notes are meant as a fun and visual way to highlight physical areas on campus where it is clear there has been a lack of funding, for example areas that have fallen into disrepair from deferred maintenance, student services that have been cut and offices lay dormant, etc. We would encourage locals to be creative with how they would like to highlight these issues (for example you may want to write an appropriate or applicable comment on the post-it). We would also ask that when you place a post-it on the broken door or water fountain that no longer works, you take a picture and send them to the OUWCC Communications Representative, Kevin Wilson: kwilson@cupe.ca. We will ensure these pictures are posted to the WTF website so others can see how underfunding has affected campuses across Ontario.

Understanding the Funding Structure

What?

During the fall of 2012, OUWCC received funding to begin an anti-privatization campaign. Some of the funding went towards a research book off to begin understanding the funding structure. From this research we produced a document called *“Unpacking Public Funding for Post-Secondary Institutions in Ontario.”* The document is referred to and summarized in the introduction to this guide.

Why?

The funding structure is quite complicated, and we have received requests to have a presentation be brought to locals either for local executive committee and/or as a mobilizing tool for members.

How?

If you would like to have a presentation of the *“Unpacking Public Funding for Post-Secondary Institutions in Ontario”* document brought to your local, please submit a request, through your campus rep, to the OUWCC. We will have a presentation brought to your local.

Reading Your University's Budget

What?

Every Ontario university is required to produce a yearly operating budget. The budget contains information about sources of revenue as well as where the money is spent.

Why?

Now that you have requested all kinds of budget information, you need to be able to read it. Being able to read your University's budget will help you with arguments at the bargaining table.

Knowing how to read budgets will also help us lobby the government to fix the accountability issues in our sector and adequately fund our Universities.

How?

Don't panic!

Don't get overwhelmed when looking at tables of numbers. It is very important to learn how to read them to strengthen our position at the bargaining table.

In 2009, the OUWCC developed a workshop "*Understanding the Financial Climate at your University*". Contact your National Staff Representative or OUWCC Representative to arrange training.

Below is a short guide for learning how to look at and interpret these numbers.

Using the example on the next page:

- The Blue box tells you 2 things:
 - The budget year for these figures, in this case the 2007-2008 academic year
 - All the numbers in this table should be interpreted in thousands of dollars. So a revenue of \$2,295 is actually \$2,295,000 (or 2.3 million dollars)
- The red arrow points to the general operating fund. The revenues going into this fund can be spent as The Board deems fit
- The Blue arrow points to research specifically earmarked for research and student awards
- The pink arrow points to the totals for each row category
- The green circle indicates all sources of university revenue (all the categories listed below the green circle are the different sources of revenue). For example, the university received \$79, 394, 000 from Government grants and \$80, 240, 000 from tuition

BROCK UNIVERSITY

Schedule I -- Statement of Operations by Fund

Year ended April 30, 2008
(in thousands of dollars)

	Operating fund and ancillary enterprises	Research and student awards	Total unrestricted	Internally restricted	Invested in capital assets	Subtotal	Endowments	Total
Revenues:								
Government grants for general operations	\$ 79,394	\$ -	\$ 79,394	\$ -	\$ -	\$ 79,394	\$ -	\$ 79,394
Research grants for restricted purposes	-	12,065	12,065	-	-	12,065	-	12,065
Grants and donations for restricted purposes	2,295	-	2,295	-	-	2,295	885	3,180
Student fees	76,801	3,439	80,240	-	-	80,240	-	80,240
Ancillary operations	26,124	-	26,124	-	-	26,124	-	26,124
Investment income	4,839	-	4,839	-	-	4,839	258	5,097
Sundry	8,677	-	8,677	-	-	8,677	-	8,677
Amortization of deferred capital contributions	-	-	-	-	3,875	3,875	-	3,875
	198,130	15,504	213,634	-	3,875	217,509	1,143	218,652
Expenses:								
Salaries and benefits	139,895	-	139,895	-	-	139,895	-	139,895
Supplies and expenses	11,172	-	11,172	-	-	11,172	-	11,172
Materials and expendable equipment	5,292	-	5,292	-	-	5,292	-	5,292
Repairs, maintenance and rent	5,879	-	5,879	-	-	5,879	-	5,879
Utilities and taxes	7,773	-	7,773	-	-	7,773	-	7,773
Interest	6,903	-	6,903	-	-	6,903	-	6,903
Cost of sales	7,231	-	7,231	-	-	7,231	-	7,231
Other	3,637	-	3,637	-	-	3,637	-	3,637
Scholarships, fellowships and bursaries	6,677	4,827	11,504	-	-	11,504	1,165	12,669
Research	-	10,677	10,677	-	-	10,677	-	10,677
Amortization of capital assets	-	-	-	-	12,165	12,165	-	12,165
	194,459	15,504	209,963	-	12,165	222,128	1,165	223,293
Excess of revenues over expenses (expenses over revenues)	3,671	-	3,671	-	(8,290)	(4,619)	(22)	(4,641)
Inter-fund transfers:								
Change in investment in capital assets	(4,049)	-	(4,049)	-	4,049	-	-	-
Change in internally restricted net assets	55	-	55	(55)	-	-	-	-
Changes in net assets	(323)	-	(323)	(55)	(4,241)	(4,619)	(22)	(4,641)
Net assets, beginning of year	28	-	28	33,681	10,744	44,453	28,598	73,051
Change in accounting policy	353	-	353	-	-	353	4,794	5,147
Net assets, beginning of year as restated	381	-	381	33,681	10,744	44,806	33,392	78,198
Net assets, end of year	\$ 58	\$ -	\$ 58	\$ 33,626	\$ 6,503	\$ 40,187	\$ 33,370	\$ 73,557

- The orange circle shows the total amount of University revenue for the operating budget. In this budget year the university generated \$218, 652, 000 in revenue
- The purple circle indicates all the sources of university expenses (all the categories listed below the purple circle are the different types of expenses). For example, the university spent \$139, 895, 000 on all employee salaries and benefits and spent \$5, 879, 000 on repairs, maintenance and rent
 - It is interesting to note that in 2007-2008 the Associate Deans, Deans, Vice-Presidents, and the President (total of 24 people) made a total of \$3, 948, 134.03 in wages alone; accounting for almost 3% of the total university expense on wages and benefits. These individuals make up only about 1.5% of the *full-time workforce* (not accounting for all the contract faculty, part-time, seasonal, and temporary workers)
- The black circle shows the total university expenses, \$223, 293, 000
- The brown circle shows the budget balance. When written in parenthesis (as in the example above) it means the university is projecting a deficit for that particular budget year, a \$4, 641, 000 deficit

Adapting “Fiscal Advisory” Language

What?

Ouwcc’s coordinated bargaining “fiscal advisory” language is key to gaining a voice in the decision-making bodies of the institution.

Union representation on a “Fiscal Advisory Committee” (or other such committee) ensures transparency and accountability as well as providing insight into employment issues, different levels of funding and policy decisions.

Why?

A fiscal advisory committee between the Union and the University, embedded in the agreement, would give us grievable recourse if not provided.

How?

Ouwcc has developed fiscal advisory language to assist Locals that wish to bargain such language in their collective agreements. Contact the Ouwcc Chair or Coordinator at the appropriate time if your local does not know or have the necessary language available to them.

Representation on Boards of Governors

What?

With the exception of Academic standards, all institutional authority is held by a University’s Board of Governors. A University’s Board bears ultimate responsibility for approving operating and capital budgets, determining service levels and has a wide range of other responsibilities.

Ouwcc encourages all Locals to seek representation on their Universities’ Boards of Governors. If the University has no provision for Labour representation on their Board, Locals should seek to gain one through collective bargaining.

Why?

The Board makes all financial decisions impacting workers and students on campus. Although some meetings of the Board are open to the public, non-Board members typically have no voice. A Union seat would give us voice and vote.

It is also an opportunity to create alliances with other groups on campus such as faculty and students. Our coordinated work with student groups is key to coalition building and will allow greater potential for student understanding of worker’s issues.

Considering each Ontario University has a distinct Act to Incorporate and Bylaws, each Local will need to develop their own strategy for implementing these changes, and adapt the language to fit their campus.

How?

1. Locate your institution's Act to Incorporate on the OUWCC website www.cupe.on.ca/s36/university
2. Review the Act looking for the composition of The Board
NOTE: Some Acts specifically exclude workers from a seat on The Board and may require legislative change to gain a seat
3. Locate the by-laws for your institution's Board. They are available on your institution's website and on the OUWCC website: www.cupe.on.ca/s36/university
4. The By-laws will contain information about the election of officers and composition of the Board

NOTE for academic workers

Check the definitions clauses of the By-laws to ensure you are not classified as "teaching staff." In most cases, "teaching staff" are full-time faculty and not workers covered by CUPE collective agreements.

5. In the event the Act and the By-laws are different, use the By-laws, as they are more current, and more likely to reflect institutional practise
6. For Locals that currently do not hold a seat on the Board, tabling the fiscal advisory language for bargaining is important. This and other language referred to in this section can be found in the Coordinated Bargaining Priorities Package⁵
7. For Locals that currently have entitlement for a seat on the Board - Claim your seat!

Search your university's website to determine who has seats on the Board⁶. This information is usually on the "University Secretariat" page of your institution's website.

⁵ If you do not have a current copy of the coordinated bargaining priorities package please contact your National Staff Representative and/or the OUWCC

⁶ We recommend a google search because University webpages are notoriously difficult to navigate (i.e. search: McMaster University Board of Governors)

McMaster University
Inspiring Innovation and Discovery

MUGSI Quick Links Select GO
Faculty & Staff Directory Search GO
McMaster University Secretariat

McMaster Academics Alumni Discover McMaster Future Students Library Research Current Students

University Secretariat

- Board of Governors & Senate Members
- Committees & Boards
 - Committee for Nominating a Chancellor
 - Contact Us
- Council Room Bookings
- Elections
- Freedom of Information and Protection of Privacy Act (FIPPA)
- History of McMaster
- McMaster's Governing Bodies
- Meeting Schedules
- Meeting Materials
- Policies, Procedures & Guidelines
- Reports and Lists
- University Act & By-laws

2012-2013 Officers of the Board of Governors

Chair of the Board - [Richard Buckingham](#)
Vice-Chair of the Board - [David Lazzarato](#)
Secretary of the Board (Acting) - [Helen Ayre](#)

Ex Officio

Chancellor
[Lynton R. Wilson](#), O.C., B.A., M.A., D.h.c. (Hon.), LL.D. (Hon.), D.C.L. (Hon.), LL.D. (Hon.), LL.D. (Hon.), LL.D. (Hon.)

President and Vice-Chancellor
[Patrick Deane](#), B.A.(Hons), M.A., Ph.D.

Chair of the University Planning Committee, and Provost and Vice-President (Academic)
 David Wilkinson, B.A.Sc, M.A.Sc., Ph.D.

Scroll down to find out if anyone holds the seats for staff.

Appointed by the Senate

[Nancy Doubleday](#), B.Sc. (Hon.) B.Ed., LL.B., M.E.S. Ph.D. (Bar of Ontario)
[Susan Searls Giroux](#), Ph.D.
[John Preston](#), B.Eng., M.Sc., Ph.D.

Elected by the Teaching Staff

[Susan D. Denburg](#), B.A., M.A., Ph.D.
[Joe Kim](#), B.Sc., Ph.D.
[Janet Landman](#), B.Sc.W., M.Ed., Ph.D.
[Herbert Schellhorn](#), Ph.D.

Elected by the Non-Teaching Staff

[Susan E. Birnie](#), B.A., M.Sc.Pl., M.B.A.
[Brad Coburn](#), B.A., M.Ed.

Elected by the Graduate Students

Murray Wilson

Elected by the Undergraduate Students

[Melanie Iarocci](#)

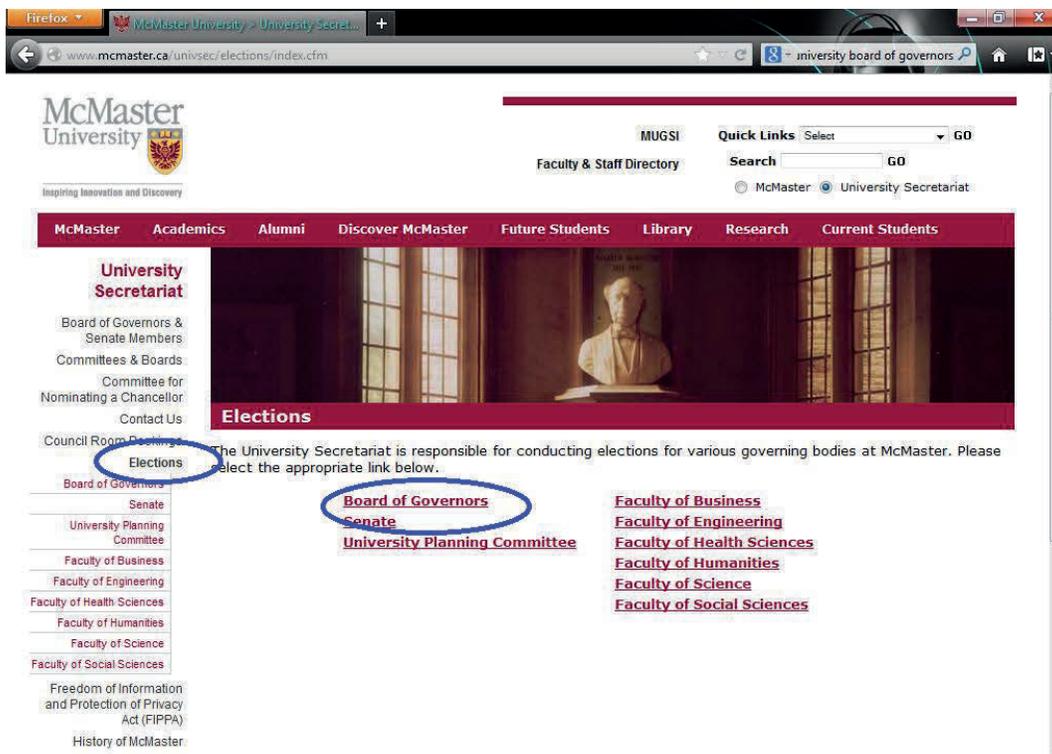
Appointed by the Lieutenant Governor in Council

[Michael Fenn](#)
[Gary D. Graham](#), B.A., LL.B.
[Gary Kain](#), B.A., M.B.A., C.A., C.B.V.
[Donald A. Pether](#), B.Sc., LL.D. (Hon.)
[Jagoda Pike](#), B.Com., LL.B.
[Thomas J. Weisz](#), B.A., LL.B., LL.M.

Honorary Governors

H. Douglas Barber, O.C., B.Sc., M.Sc., D.I.C., Ph.D., D.Eng (Hon.), D.Sc. (Hon.), F.C.A.E., P.Eng.
 Colum P. Bastable, F.C.A. (Irl), LL.D. (Hon.)
 T. Glen Chambers, B.A., LL.D. (Hon.)
 Donald M. Green, C.M., LL.D. (Hon.)
 Donald A. S. Ivison, B.A., M.B.A., N.D.C., LL.D. (Hon.)

If the seat is occupied, follow the link for “Elections” and for “Board of Governors” (or something similar) to find information about when and how elections take place.



The screenshot shows the McMaster University website at the URL www.mcmaster.ca/univsec/elections/bog/bog1.cfm. The page is titled "Board of Governors Elections" and includes a "Call for Nominations" section for an "Undergraduate Student Representative". The page has a navigation menu with items like "McMaster", "Academics", "Alumni", etc. A sidebar on the left lists various university bodies. The main content area has tabs for "Nomination Announcements", "Forms", "Candidates and Resumes", "Results", "By-Laws", and "Online Voting". Three arrows point to these tabs: a blue arrow to "Nomination Announcements", a red arrow to "Forms", and a purple arrow to "Online Voting".

Using the example above:

- The Nominations Announcements tab (blue arrow) shows what positions are open
 - The Forms tab (red arrow) shows how you run for a position
 - The Online Voting tab (purple arrow) has information about the voting procedure
8. In bargaining, table the OUWCC language about the various committees of the Board, such as the audit committee or finance committee.
- Be sure to review your University Bylaws for information about what committees are available, what the mandate of each committee is, and how one becomes part of that committee
 - This information can also typically be found on your institution's webpage

Tips:

- Familiarize yourself with the elections process for the Board
- Continue to monitor the elections page to find out when you can run for positions
- Non-teaching staff are typically elected by those workers, so when running it will be important to advertise your candidacy to get votes

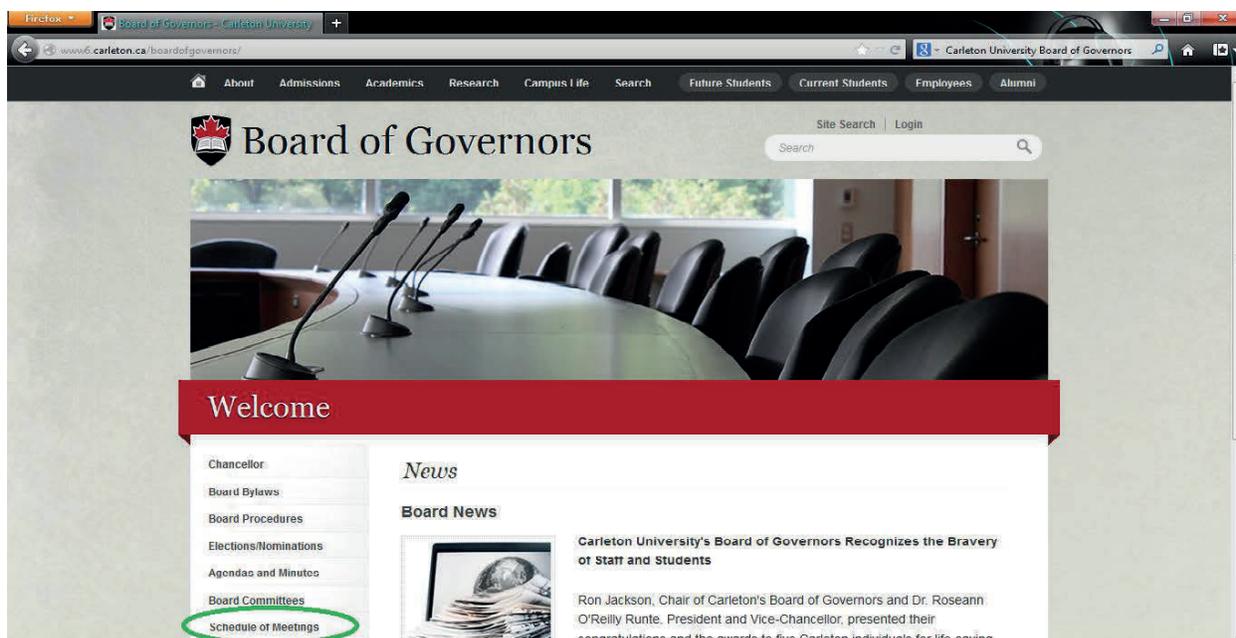
Important Things to Remember

1. The Board makes all financial decisions including the mandate to the employer's bargaining team and ratifying new collective agreements
2. As provided in the Act to Incorporate, the Board has full authority to amend their Bylaws
3. If the employer's bargaining team tries to tell you there is no way they can amend the bylaws through bargaining, call their bluff. The Board is *the* group that has the authority to both ratify a collective agreement and amend the bylaws. Thus they can change their bylaws once your agreement is ratified

Meetings of The Board

For those locals who currently do not go to the open part of their Board's meetings, below is a short guide to help you find out when your Board meets

1. Do a Google search of your institution and Board of Governors (i.e. Carleton University Board of Governors)



- Down either the right or left-hand side of the page you should see a link for “Meetings” or “Meetings of the Board” or “Meetings Schedule.” Clicking that link should bring up a schedule for the full academic year and the locations of those meetings

NOTE: Some schedules contain information for the meeting time(s)/schedule(s) for the Senate and sub-committees of the Board. You will have to check the Board’s bylaws if the other meetings are open to the public, but what is of particular interest are the “Board” meetings. In the example below the notations in parentheses denote the location.

Month	Date	Meeting	Month	Date	Meeting
AUGUST	21	Board Orientation 8:30 am (R)	FEBRUARY	12	Building (R) Cancelled
				15	Senate
SEPTEMBER	18	Audit & Finance (R)	MARCH	4	Governance (Rm 607, RO)
	20	Executive (S)		15	Building (R) (8:30 a.m.)
	28	Senate		18	Finance (R)
				20	Executive (A)
OCTOBER	2	BOARD (S)		22	Senate
	9	Governance (A)		25	BOARD (River Building)
	17	Comm. Relations (R)	APRIL	3	Nominating (A)
	26	Senate		9	3pm – Award Jury – moved
	30	Executive (A)		9	4 pm – Comm. Rel. – moved
NOVEMBER	8	Building (R)		18	3 pm – Award Jury
	10	Convocation			4 pm – Audit & Finance (R)
	14	Audit & Finance (R)		22	Executive (A)
	21	Executive (A)		26	Senate
	24	9 am BOARD (Res. Commons)		25	BOARD (R)
	24	10 am BOARD RETREAT (Res. Commons)	MAY	8	Governance (A)
	30	Senate		16	Building (R)
				21	Comm. Rel.
				22	Executive (A)
				31	Senate

How to Get Elected

This will vary depending on your institution and what you are able to win in bargaining.

If your local is successful in gaining a seat on your Board through bargaining, then it will be up to your local to decide how the seat is allotted (i.e. given to the president or the representative elected at a membership meeting).

If your institution’s Act provides a seat for workers on your campus already, you will need to consult the definitions in your Boards bylaws to make sure your workers fit in that category. You will then need to consult the elections procedure on the Board’s webpage (see the above instructions for finding the elections procedure).

What to do Once Elected

While we would love to have step-by-step instructions of helpful tips for those of you who get elected to the Board, unfortunately, there is very little information about what it is like to be on the Board of an institution.

In general, the goal of this section is to gain a *union seat* on The Board, thus you are there to represent the interests of the union, and the workers you represent. We are asking the elected representative(s) to regularly report back to the membership about the activities of the Board.

Because this is the first time we are attempting a wide-scale CUPE presence on the Board, we will be relying on those of you who are successful to tell us about your experiences on the Board. This will allow us to coordinate actions in the future and be able to prepare the next generation of Board representatives for what to expect.

We are asking all those who successfully gain a seat on the Board to create a short, twice-yearly report, to be communicated with the OUWCC executive board, through the campus rep. We ask the report contain at least the following information:

- What the orientation was like, what it entailed (for example, are you asked to sign a confidentiality agreement? What does the agreement look like?)
- What types of things are typically discussed at the Board
- Seat of Power
 - Who holds the real power on The Board? While it is enshrined in the Act that the Board retains all the decision-making power, it is possible that one or two Board members actually run the show, and the Board is simply there to “rubber-stamp” decisions.
- The process for bringing motions forward
- The types of issues that are discussed at meetings (particularly the closed sessions)
- How much and how thorough is the background material Board members receive
- Any other relevant information

We are also hoping that the union uses this seat to network with other Board members. For example, this is a great opportunity to build inroads with other campus stakeholders, such as faculty, undergraduate and graduate students, and other workers on campus. It is also an opportunity to start building relationships with community partners who hold seats on the Board, in order to gain support on the Board for the union and its interests.

For those locals who are unable to win this language in bargaining, we ask that each local begin sending a representative to the “open” or “public” section of the Board meetings. Similarly to those elected, we ask that you write a short, twice-yearly report for your campus rep to bring to the OUWCC executive about the activities of the Board.

We understand that for some workers attending Board meetings may be a difficult thing to do if you do not have language for a work release or book off for the president (or other executive members) in your collective agreement. The OUWCC, through the campus reps, will help to develop a strategy for those locals to be able to attend these meetings.

Once we have some data and experiences from member of the Board, we can begin putting together a guide of experience and tips for future Board members.

Reading your Board's By-laws

While this may seem like a simple question, reading the Board's bylaws is similar to reading a collective agreement; each is slightly different and they are written in "legalese." Because of this there is no one simple answer to the question, nor will it be possible to create a "how to" section about it.

If you need assistance reading your Board's bylaws, we recommend you contact your National Representative or your Campus Representative. If there is enough interest at your local or on your executive, we may be able to schedule a training session to sit down and go through your institution's bylaws.

Disclosure Requests

What?

During bargaining a union may submit a “disclosure request” to the employer for access to detailed information about their membership. Disclosure requests are an opportunity to ask specific questions that you would regularly need to request through the Freedom of Information and Protection of Privacy Act (FIPPA). It is an opportunity to gain access to extra information that employers would not normally be compelled to provide us.

Why?

Disclosure requests aid in the creation of bargaining proposals as well as making arguments at the table to support proposals.

How?

The OUWCC has developed common language and some tools for coordinated bargaining proposals. If you have not received a copy, or would like additional copies of the material please contact the OUWCC through the coordinated bargaining conference calls, your campus rep and/or your National Staff Representative.

For locals in bargaining for 2013 and 2014, we have created 4 common requests:

- A full and complete copy of the 2010, 2011 and 2012 audited annual statement, provided by the auditor or auditors licensed under the Public Accountability Act, including all accounts and transactions of the University, as required by the by-laws of the university
- A full and complete copy of the 2012- 2013 university budget
- A complete and full listing/record of all funded (occupied or vacant) position numbers and descriptions that fall within the scope clause of CUPE Local XXXX and all associated documentation of plans and/or discussions to eliminate any such positions
- List of bargaining unit employees, mailing addresses, home phone number, email address, rate of hire, classification, employment status, weekly hours of work, hourly rate/annual salary and benefits

For locals that negotiate benefit and pension plans:

- Benefit Plan Details including;
 - A copy of the Employee Benefits Booklet;
 - The master contract, including updated amendments for all benefits;
 - A copy of the Underwriting Agreement with all insurers

- Benefits census and financial information including;
 - Census data for all eligible members (age or date of birth, gender, salary, occupation, benefits waived by line, status i.e., active, LOA, disabled etc);
 - Claims experience - paid claims for past 3 years and paid premiums, or copy of last 3 renewal statements from insurer;
 - Financial report or audited statement of the trust fund for the last three years including a breakdown of all reserves and expenses for the last three years;
 - Premium rates for the last 3 years/single/family;
 - Please confirm whether you or the underwriter will be providing this information

- Pension plan documentation
 - Plan Text document currently in force (including all amendments either within consolidated Text or attached);
 - Actuarial valuation report most recently filed with regulatory authorities;
 - Annual Information Returns filed with FSCO over past 15 years;
 - Audited Financial Statements filed with regulatory authorities over past 15 years;
 - Employee booklet summarizing plan provisions (if any)

At the 2014 annual spring conference, the OUWCC will discuss if there are additional disclosure requests required for coordinated bargaining and connecting up with this campaign.

Filling out a FIPPA

What?

FIPPA stands for the “Freedom of Information and Protection of Privacy Act.”

This Act allows public access to information held by institutions and sets out what information you can legally access.

Why?

We need information to defend our work and make advancements in bargaining.

Budget Information

The information Ontario universities publish does not contain enough detail to determine accountability and transparency. The information falls short on detail, particularly as it relates to expenditures. A FIPPA request can give you access to much more detail, as well as the detailed audit conducted yearly.

Be aware, Ontario universities have 2 budgets:

1. Operating budget for income and expenses
2. Capital budget for assets and holdings

We should initially be more focused on Operating budgets, which will detail where the funding is coming from and how it is spent. Interestingly, Ontario universities project deficits each budget year and typically cry poverty.

We absolutely agree Ontario universities are underfunded, but how do they afford ½ million dollar salaries for presidents or the purchase of prime downtown Toronto real estate?

The question is not about how much they receive, it is about WTF!

Salaries and Expense accounts

FIPPA requests will get your local detailed information about employment contracts for administrators, many of who have 6 figure salaries, various perks and expense accounts.

Contracts with private corporations

After we have reviewed the detailed financial information, we can better identify the sources of privatization on campuses. FIPPA requests can give us access to any contracts with private corporations.

How?

Every Ontario University will have a FIPPA request procedure. You can locate a FIPPA request form on your university's webpage or through the Ministry of Government Services webpage: http://www.mgs.gov.on.ca/en/infoaccessandprivacy/STDU_102686.html?openNav=freedom_of_information_%28foi%29 (scroll down and click "Access or Correction Request Form")

We have more information on our website about how to navigate your university's webpage and locate the proper procedure for filing a FIPPA request. If you would like to file a FIPPA please speak with your National Staff Representative and see our website at: cupe.on.ca/wtf

We have also included 2 sample FIPPA requests on the next 2 pages. These, in conjunction with the tips below, will help give you a reference for crafting language for your FIPPA request.

Tips:

- FIPPA requests must be specific to allow the institution to locate the requested document(s).
- The university must send you the requested documentation within 30 days of receiving the request. So plan ahead!
- Universities charge a nominal fee with the submission of a FIPPA requests, typically \$5.00. The institution has the right to charge for associated photo copying costs.



Access to Information and Correction of Personal Information REQUEST FORM

Please Note: a \$5.00 application fee is required to process all requests (cheque or money order, payable to YORK UNIVERSITY).

First, read the **FIPPA Access Request Procedure** at www.yorku.ca/ipo/AccessDocs/FIPPAAccessRequestProcedure.pdf on the Information and Privacy Office website. Complete this form by filling in the fields below, then print.

Request for (check one only):	Name of York University office to which you are making your request:	
<input checked="" type="checkbox"/> Access to General Records	<input checked="" type="checkbox"/> Information and Privacy Office	
<input type="checkbox"/> Access to own Personal Information	<input type="checkbox"/> Other, please specify:	
<input type="checkbox"/> Correction of own Personal Information		
Last name: <u>Brown</u>		
First name: <u>Liam</u>	Middle name:	
Street address, apartment: <u>350 Victoria Street</u>		
City, town: <u>Toronto</u>	Province: <u>ON</u>	Postal code: <u>M5B 2K3</u>
Email (optional):	Tel. no. (day): <u>(416) 979-5177</u>	Tel. no. (evening):
If request is for access to, or correction of, own personal information records:		
Last name appearing on records <input type="checkbox"/> same as above, or (specify):		
Please give a detailed description of requested records, personal information or personal information to be corrected.		
<p><u>A full and complete copy of the employment contract between Mamdouh Shoukr, for the position of President, and York University, included but not limited to: salaries, bonuses, properties, lease holdings or other such employment gratuities, housing, transportation, and any other emoluments.</u></p>		
<p>NOTE 1: if you are requesting access to or correction of your own personal information, please identify the personal information bank or record containing the personal information, if known. NOTE 2: if you are requesting a correction of personal information, please state the desired correction and, if appropriate, attach any supporting documentation. You will be notified if the correction is not made and you may require that a statement of disagreement be attached to your personal information.</p>		
Preferred method of access to records:	<input type="checkbox"/> examine original <input checked="" type="checkbox"/> receive copy	Signature: _____
		Date: _____

Information and Privacy Office

updated June 2012

page 1 of 2

Request Form

Please Note: A \$5.00 application fee is required for all requests.

Request for: <input checked="" type="checkbox"/> Access to General Records <input type="checkbox"/> Access to Own Personal Information <input type="checkbox"/> Correction to Own Personal Information	Name of Institution request made to: University of Windsor
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If request is for access to, or correction of, own personal information records:

Last name appearing on records: same as below, or: _____

<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input checked="" type="checkbox"/> Ms. <input type="checkbox"/> Miss First Name: <u>Sophia</u> Address: (Street/Apt. No./P.O. Box/R.R. No.) <u>1280 Main Street West</u> Province: <u>ON</u> Telephone Number (Day): <u>(519) 253-3000</u>	Last Name: <u>Patel</u> Middle Name: _____ City/Town: <u>Windsor</u> Postal Code: <u>N9B 3P4</u> Telephone Number (Evening): () _____
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Detailed description of requested records, personal information or personal information to be corrected. (If you are requesting access to or correction of your personal information, please identify the personal information bank or record containing the person information, if known.)

Listing/record of all funded (occupied or vacant) position numbers and descriptions that fall within the scope clause of CUPE Local 793, and all associated documentation of plans and/or discussions to eliminate any such positions

Note: If you are requesting a correction of personal information, please indicate the desired correction, and if appropriate, attach any supporting documentation. You will be notified if the correction is not made and you may require that a statement of disagreement be attached to your personal information.

Preferred method of access to records: <input type="checkbox"/> Examine Original <input checked="" type="checkbox"/> Receive Copy	Signature: _____	Date: _____
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For Institution Use Only

Date Received: _____	Request Number: _____	Comments: _____
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Personal Information contained on this form is collected pursuant to the Freedom of Information and Protection of Privacy Act/Municipal Freedom of Information and Protection of Privacy Act and will be used for the purpose of responding to your request. Questions about this collection should be directed to the Freedom of Information and Privacy Co-ordinator at the institution where the request is made.

Lobbying

What?

Lobbying is the coordinated actions of a group of people to influence governments to enact change. Lobbying is done through actions, letters to and meetings with MPPs and MPs, and other such activities.

Why?

The ultimate goal of this campaign is to create greater accountability measures on Board of Governors. We can only achieve so much in bargaining, the best way to achieve our goals may be to lobby for legislative change.

Politicians are elected to office to serve the public. Sometimes it's easy to forget that it's us – the voters – who hold the power. As workers in the sector we have direct, first-hand experience that goes beyond the understanding of most politicians.

The tools presented in this guide will establish the demonstrated need for greater accountability and transparency of how Ontario universities spend public funds. Lobbying allows us to make the politicians see that as well.

How?

As the campaign progresses we hope to put together trainings and kits that will allow locals to take more direct action with their MPs and MPPs. Our goal is to not just have locals speaking with their MPs and MPPs but also coordinated lobby days through the OUWCC. More information will become available as the OUWCC works on these coordinated efforts.

What Else is in My Kit?

Your kits also include a compact disc with additional information to help you implement this campaign on your campus. The CDs include:

CAIS Data

CAIS stands for the Collective Agreement Information System. The CD contains the most up to date collective agreements across the sector. We hope this information will be helpful for you in bargaining.

Post-Secondary Education: Our Choices, Our Future

This document was created by the CUPE National Post-Secondary Education Task Force. The booklet contains information about the national strategy for post-secondary education. We hope it will give locals more information, and more ideas about how to speak with members about the importance of government funding for our sector.

Other Resources

Sunshine Lists

The Public Sector Salary Disclosure Act requires that all organizations that receive public funding annually disclose the names, positions, salaries, and taxable benefits of those who make over \$100 000. The lists that are generated from this disclosure are lovingly referred to as the “Sunshine Lists.”

We have posted the sunshine lists, broken down by institution, covering the salaries of top administrators⁷ from 2008-2012, on the WTF website, which is cupe.on.ca/wtf. The full list of all universities covering those years is also included. We have also included a “Year over Year Chart Calculation” spreadsheet, which is an easy-to-use tool to help you calculate wage percent increases over that time period for any/all individuals on your institution’s sunshine list.

We hope this information will be helpful in bargaining, and also to help you develop some of your own fast facts, geared towards your institution that will help you in speaking with others about the importance of increasing funding in the university sector.

⁷ Position titles included are: Presidents, Principals, Vice Presidents, Associate Vice Presidents, Vice/Associate Principals, Registrars, Deans, Associate/Vice Deans, Provosts, and Vice/Associate Provosts

